RecTrac Lab Chapter 7: Facility Tab Processing

Welcome to the RecTrac Lab!

RecTrac's Facility module manages the schedules of your organization's venues. Meeting rooms, pavilions, gymnasiums, parks - whatever your space, you can reserve it with the Facility module.

This course explores how to make, change, and cancel facility reservations for your customers using the Facility and Purchase History tabs in Global Sales.

Before you proceed:

This course builds upon content found in previous chapters of the RecTrac Lab. We recommend you complete **RecTrac Lab Chapter 2: Global Sales** and **RecTrac Lab Chapter 3: Purchase History** before getting started.

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The Facility Module

Nearly every VSI customer uses the Facility module.

- ***In this course, we'll investigate the Facility tab.*** Looking to make reservations with the SuperGrid, too? Be sure to check out **RecTrac Lab Chapter 8!**

- ***Facilities are usually physical structures.*** Rooms, fields, gymnasiums, parks. Anything that's tied to a location for a set period of time could be a facility in RecTrac.

- ***The Facility module helps you manage events at your organization.*** We'll learn how to reserve facilities for events like team meetups, parties, weddings, and more.

- ***You can update reservation details using Purchase History.*** We'll take a look at how to change and cancel reservations with the Purchase History tab in Global Sales.

- ***RecTrac automatically checks facility availability.*** Easily avoid double bookings caused by activities, league games, and other customer reservations.

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Reservations

- ***Help your customers have awesome on-site experiences.*** In this lesson, we'll explore how to make reservations using the Facility tab in Global Sales.

- ***Schedule facility reservations and put your spaces to use.*** Just find a facility, set reservation details, and complete the transaction using the Shopping Cart.

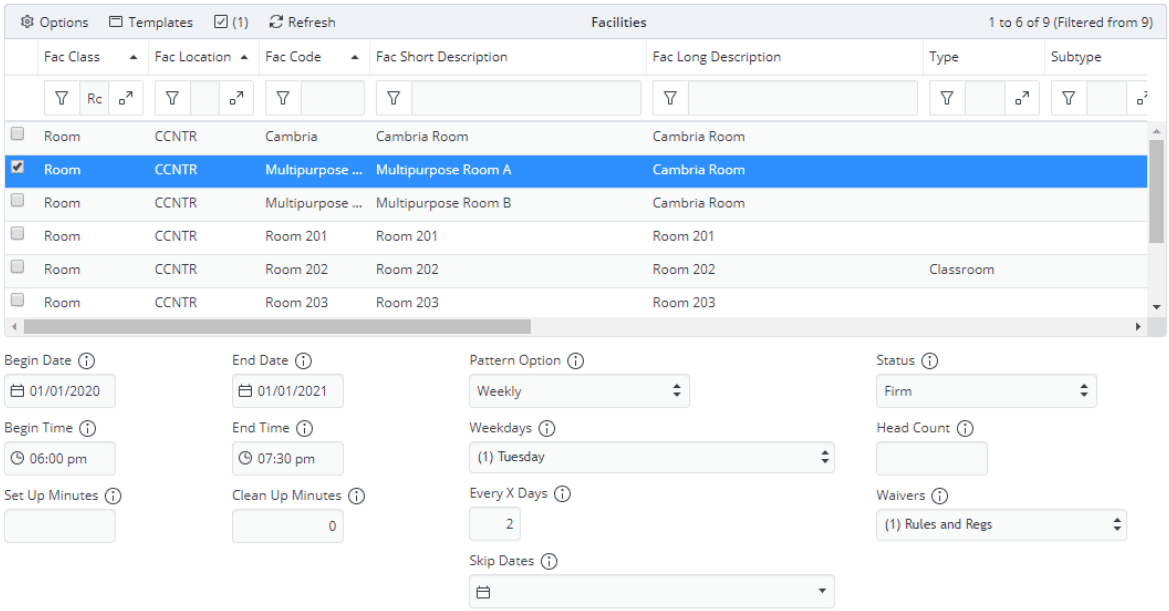
Expert Tip: Pattern Reservations

You can use the Pattern Option to make a repeating series of reservations.

- ***Example: Ping Pong Practice***
  - Takes place every other Tuesday from 6 - 7:30 PM
  - Hosted in Multipurpose Room A

  Pattern Reservation Setup:
  - Facility: Multipurpose Room A
  - Begin Time: 6:00 PM
  - End Time: 7:30 PM
  - Pattern Option: Weekly
  - Weekdays: Tuesday
  - Every X Days: 2 *

  ** Indicates that the reservation occurs every second Tuesday*



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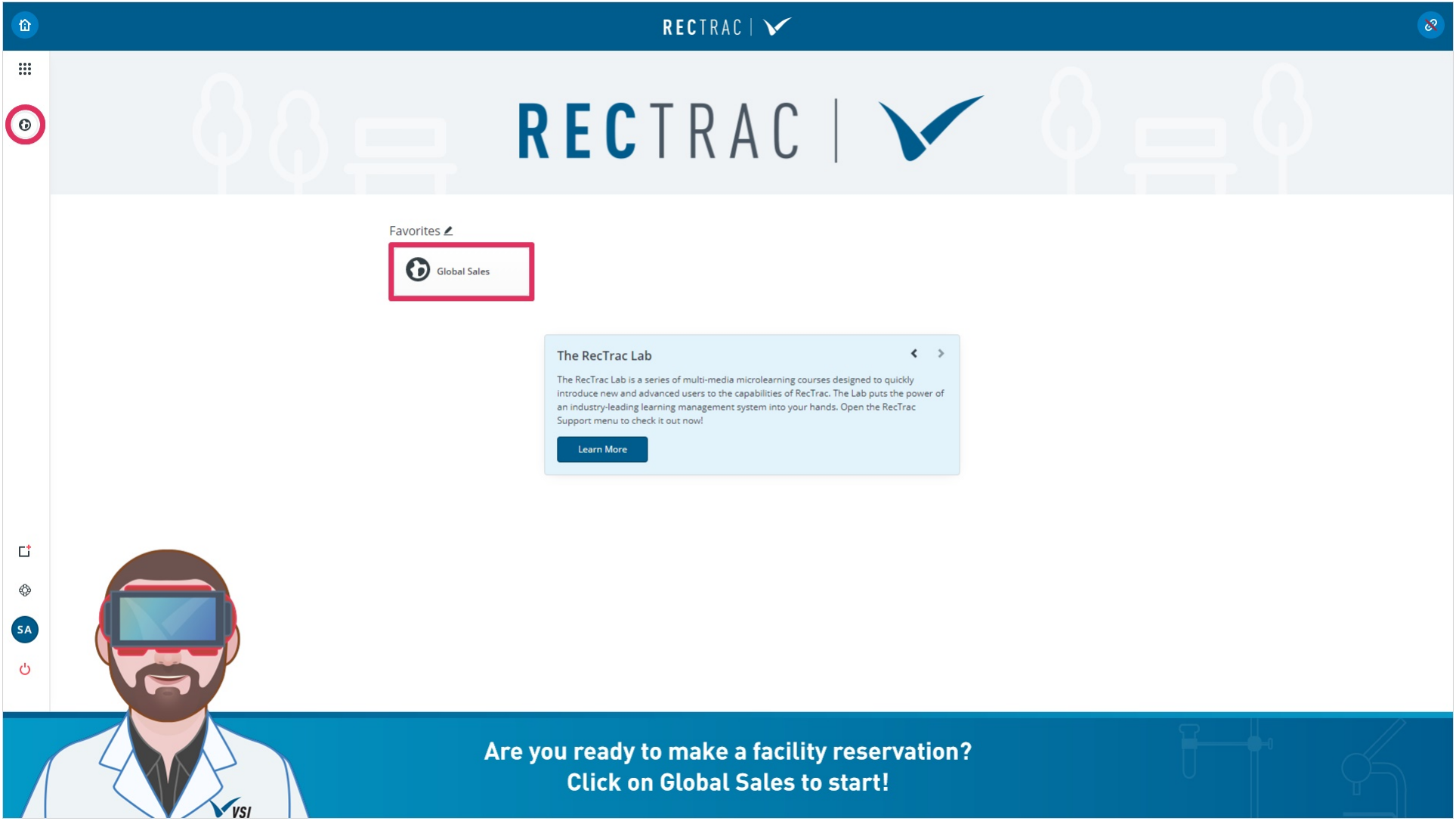
RECTRAC LAB CHAPTER 7: FACILITY RESERVATION WALKTHROUGH



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RECTRAC LAB CHAPTER 7: FACILITY RESERVATION WALKTHROUGH

RECTRAC

Global Sales Lookup

Global Sales Lookup

Lookup | Search

Options | Templates | (1) | Refresh | Family Member Datagrid | 1 to 16 of 48 (Filtered from 48)

Last Name	First Name	Status	Birthday	HH Address 1	HH Email Address	HH ID	Category
		(1) Active					(0) Selected
Ackbar	Admiral	Active	01/01/1965	1 Cruiser Way	aackbar@moncala.org	14	Resident
Ackbar	Little	Active	09/01/2015	1 Cruiser Way	aackbar@moncala.org	14	Resident
Amidala	Padmé	Active	05/19/1999	Naboo	padme@galacticrepublic.gov	7	Resident
Antilles	Wedge	Active	05/25/1977	X-Wing Starfighter	wedge@roguesquad.org	38	Resident
C-3PO	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident
Calrissian	Lando	Active	05/21/1980	Cloud City	lando@millenniumfalcon.org	8	Resident
Chewbacca	Mr	Active	05/25/1977	Millennium Falcon	chewie@millenniumfalcon.com	16	Resident
CUSTOMER	YOUR	Active		Your Customer's Address	customer@reccenter.org	10	Resident
Fett	Boba	Active	05/25/1977	Kamino	bobafett@mandalorian.com	23	Resident
Greedo	Mr	Active	05/25/1977	Tatooine	greedo@bountyhunter.edu	35	Resident
Hutt	Jabba The	Active	05/25/1977	Tatooine	jabba@thehutt.org	9	Resident
Kenobi	Obi Wan	Active	05/25/1977	Tatooine	obiwan@jediknights.com	18	Resident
Mothma	Mon	Active	05/25/1983	The Senate	mothma@galacticsenate.gov	40	Resident
Nunb	Nien	Active	05/25/1983	Sullust	nnunb@sullust.com	6	Resident
Organa	Leia	Active	05/25/1977	Alderaan	leia@rebelalliance.org	27	Resident
R2-D2	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident

Add | Change Household | More | Skip | Select

Now that you've found YOUR CUSTOMER's household, double click on their line or press the Select button.

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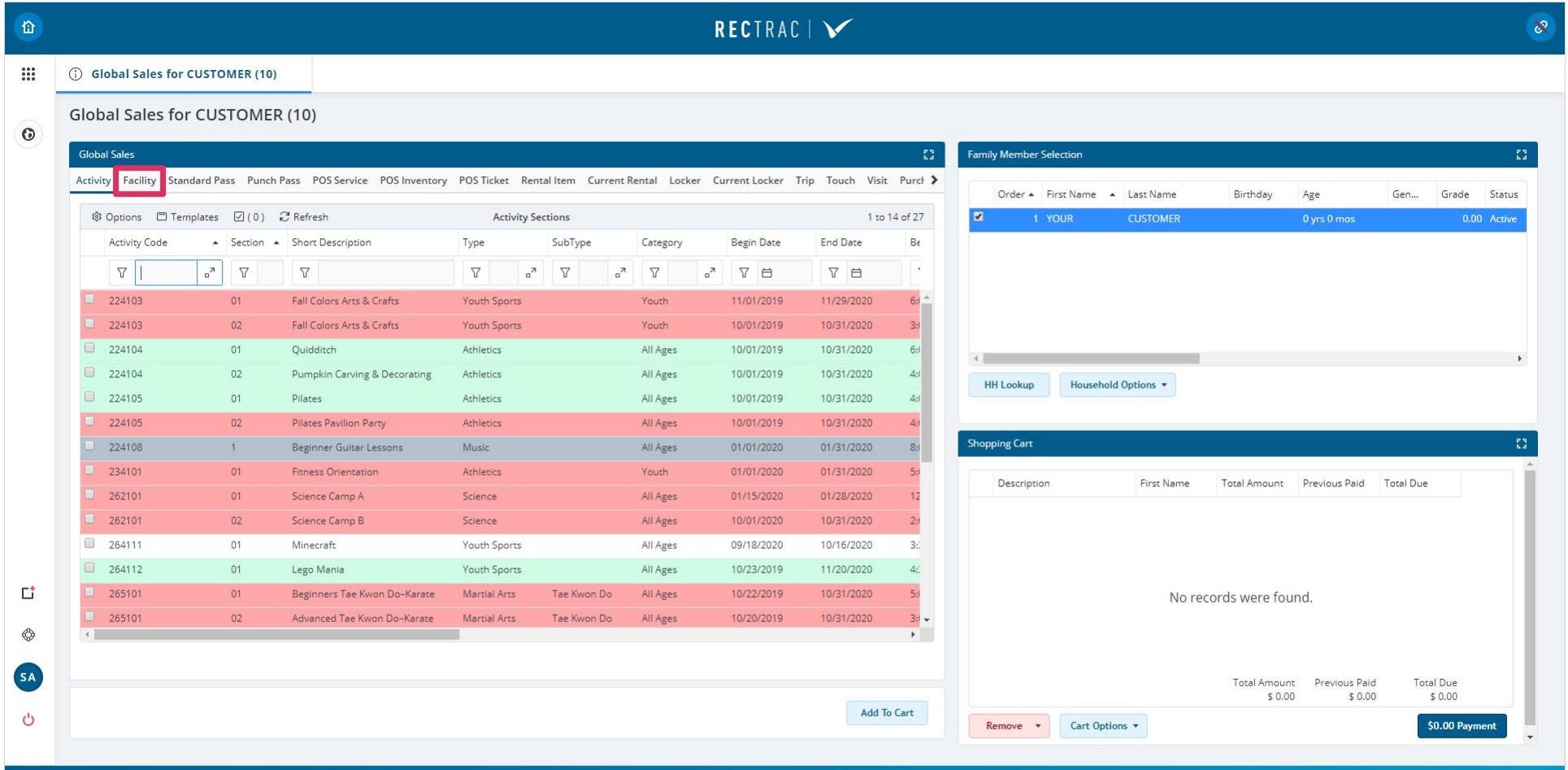

Our Global Sales screen defaults to the Activity module, but YOUR CUSTOMER wants to reserve a facility. Click on the Facility tab at the top of the screen.

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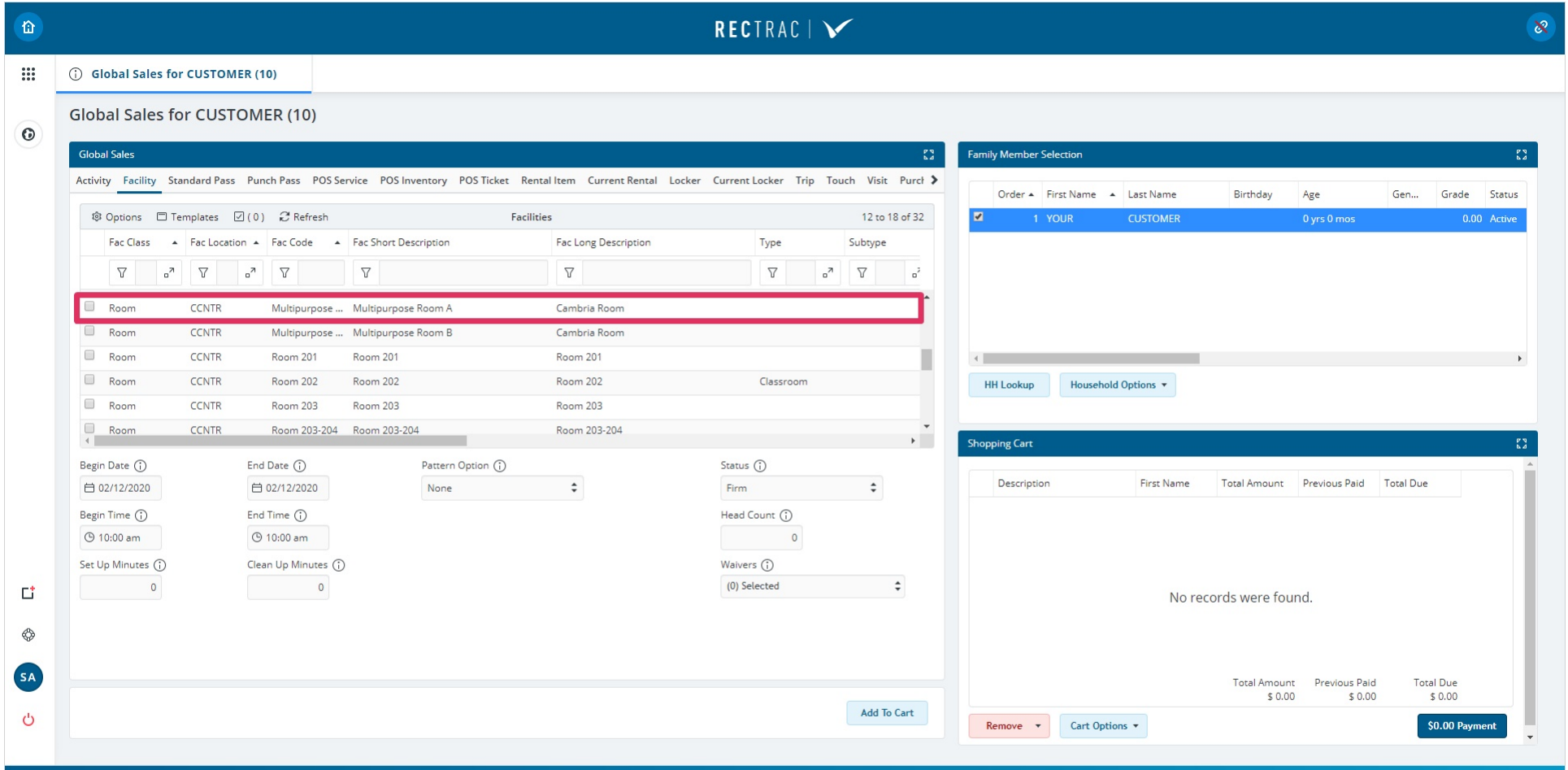

YOUR CUSTOMER would like to reserve Multipurpose Room A. To start the reservation process, select it from the Facilities DataGrid.

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RECTRAC LAB CHAPTER 7: FACILITY RESERVATION WALKTHROUGH

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Global Sales for CUSTOMER (10)

Global Sales for CUSTOMER (10)

Global Sales

Activity | Facility | Standard Pass | Punch Pass | POS Service | POS Inventory | POS Ticket | Rental Item | Current Rental | Locker | Current Locker | Trip | Touch | Visit | Purcl

Options | Templates | (1) | Refresh | Facilities | 12 to 18 of 32

Fac Class	Fac Location	Fac Code	Fac Short Description	Fac Long Description	Type	Subtype
Room	CCNTR	Multipurpose ...	Multipurpose Room A	Cambria Room		
Room	CCNTR	Multipurpose ...	Multipurpose Room B	Cambria Room		
Room	CCNTR	Room 201	Room 201	Room 201		
Room	CCNTR	Room 202	Room 202	Room 202	Classroom	
Room	CCNTR	Room 203	Room 203	Room 203		
Room	CCNTR	Room 203-204	Room 203-204	Room 203-204		

Begin Date: 02/12/2020
End Date: 02/12/2020
Pattern Option: None
Status: Firm
Begin Time: 12:00 am
End Time: 12:00 am
Head Count:
Set Up Minutes:
Clean Up Minutes:
Waivers: (1) Rules and Regs

Add To Cart

Family Member Selection

Order	First Name	Last Name	Birthday	Age	Gen...	Grade	Status
1	YOUR	CUSTOMER		0 yrs 0 mos		0.00	Active

HH Lookup | Household Options

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due

No records were found.

Total Amount $ 0.00 | Previous Paid $ 0.00 | Total Due $ 0.00

Remove | Cart Options | $0.00 Payment

When you make a reservation, be sure to select important details like the date and time. To continue, double click on Multipurpose Room A or press Add To Cart.

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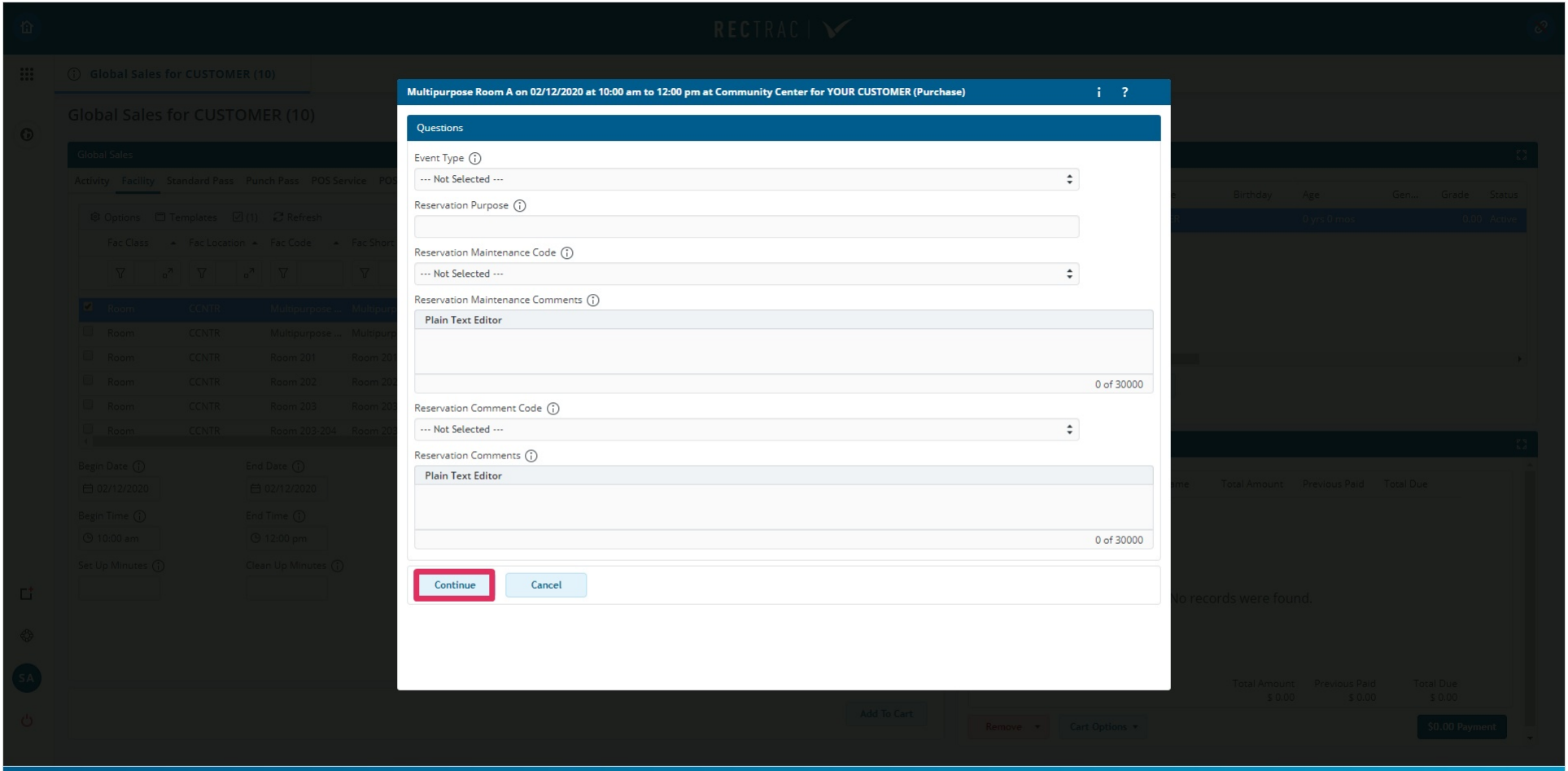

When you encounter processing prompts, make sure to read them and fill them out. Then press Continue!

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Global Sales for CUSTOMER (10)

Global Sales for CUSTOMER (10)

Global Sales

Activity | Facility | Standard Pass | Punch Pass | POS Service | POS Inventory | POS Ticket | Rental Item | Current Rental | Locker | Current Locker | Trip | Touch | Visit | Purcl

Options | Templates | (0) | Refresh | Facilities | 12 to 18 of 32

Fac Class	Fac Location	Fac Code	Fac Short Description	Fac Long Description	Type	Subtype
Room	CCNTR	Multipurpose ...	Multipurpose Room A	Cambria Room		
Room	CCNTR	Multipurpose ...	Multipurpose Room B	Cambria Room		
Room	CCNTR	Room 201	Room 201	Room 201		
Room	CCNTR	Room 202	Room 202	Room 202	Classroom	
Room	CCNTR	Room 203	Room 203	Room 203		
Room	CCNTR	Room 203-204	Room 203-204	Room 203-204		

Begin Date: 02/12/2020
End Date: 02/12/2020
Pattern Option: None
Status: Firm
Begin Time: 10:00 am
End Time: 10:00 am
Head Count: 0
Set Up Minutes: 0
Clean Up Minutes: 0
Waivers: (0) Selected

Add To Cart

Family Member Selection

Order	First Name	Last Name	Birthday	Age	Gen...	Grade	Status
1	YOUR	CUSTOMER		0 yrs 0 mos		0.00	Active

HH Lookup | Household Options

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due
Multipurpose Room A on 0...	YOUR	$ 240.00	$ 0.00	$ 240.00
		Total Amount $ 240.00	Previous Paid $ 0.00	Total Due $ 240.00

Remove | Cart Options | $240.00 Payment

Multipurpose Room A has been added to YOUR CUSTOMER's Shopping Cart.
Click on $240.00 Payment to check out.

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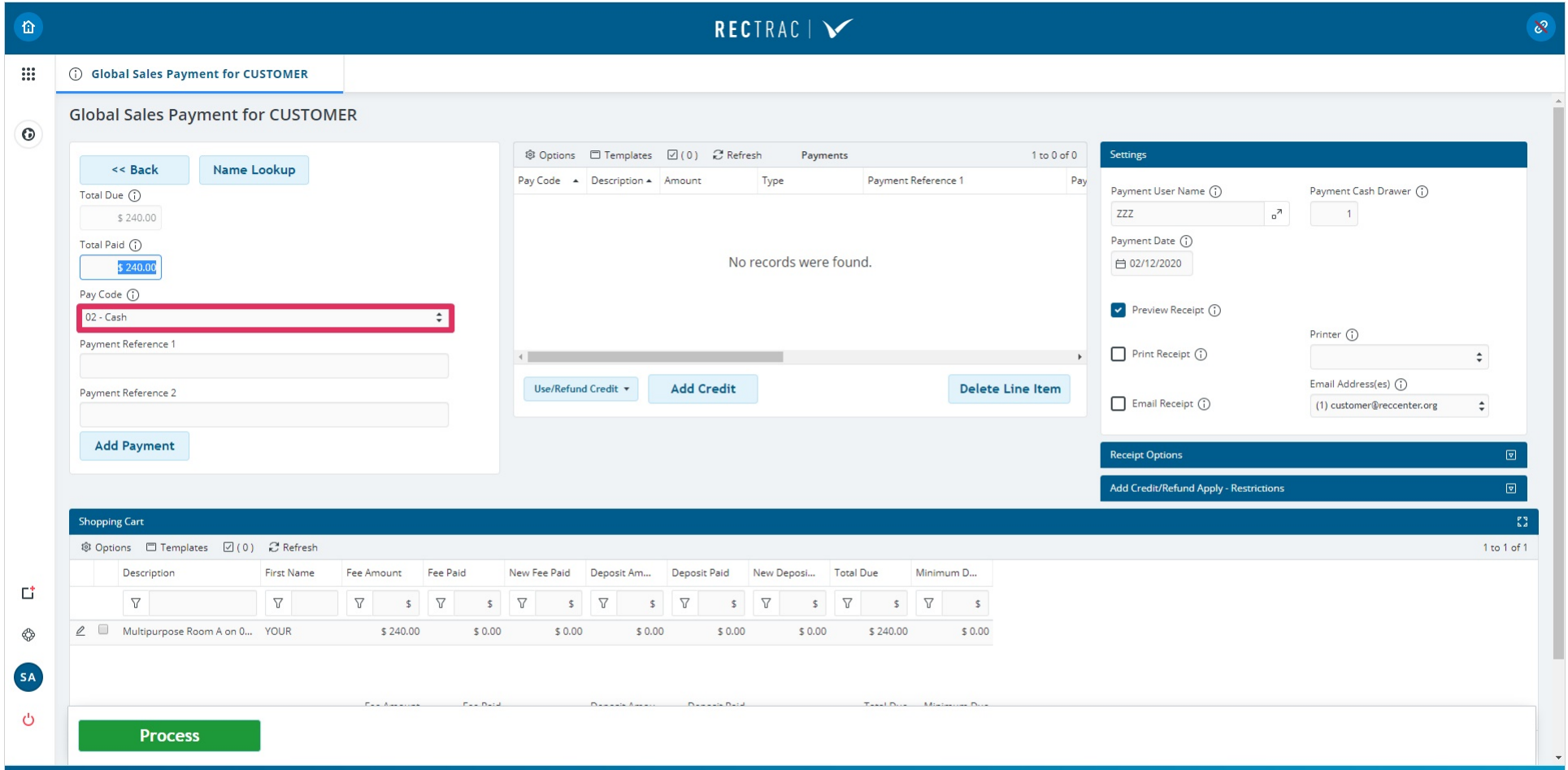

This is the Payment screen. Click on the Pay Code drop down menu to choose YOUR CUSTOMER's payment method.

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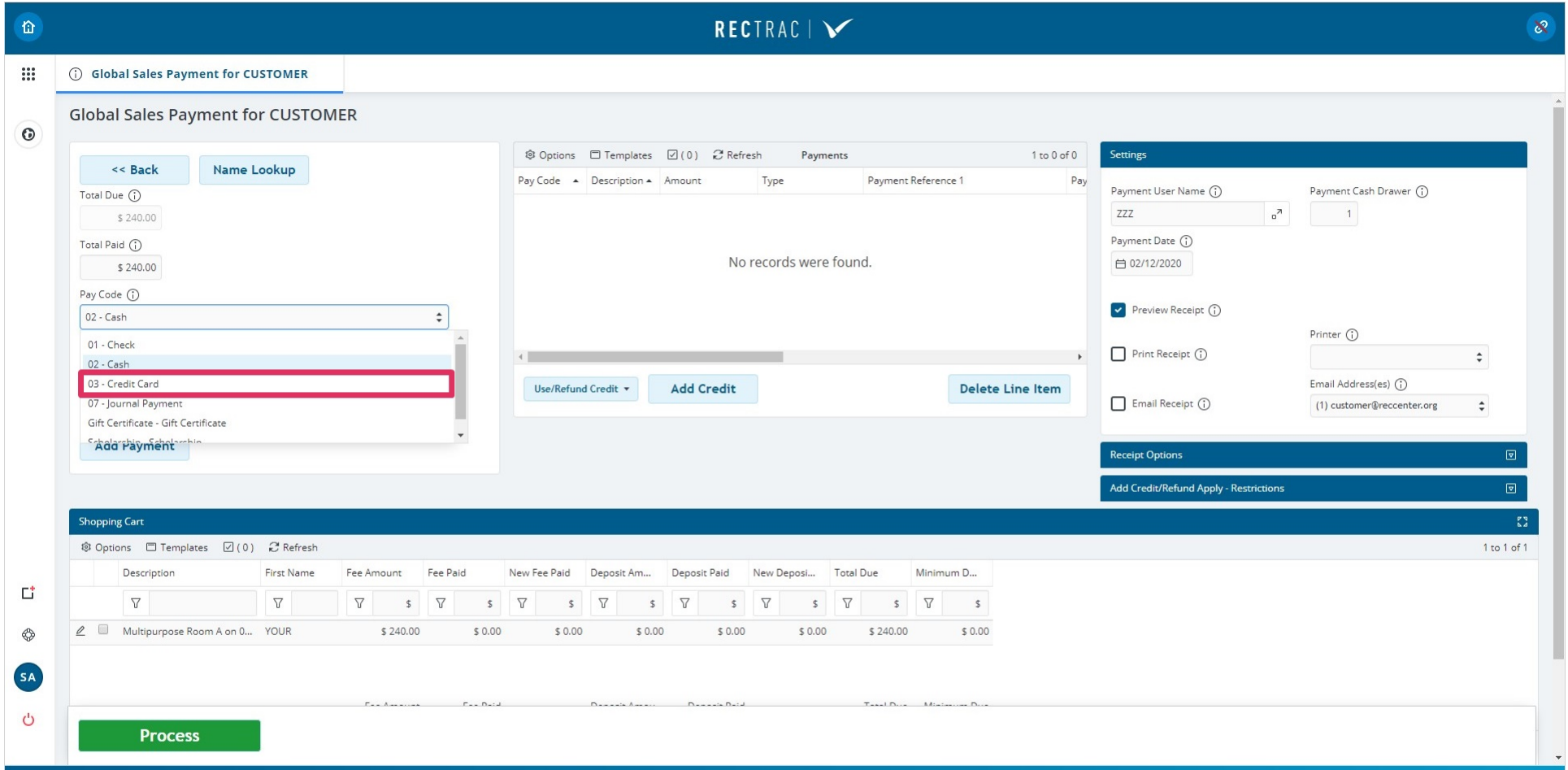

YOUR CUSTOMER wants to pay by card.
Choose Credit Card from the list of pay codes.

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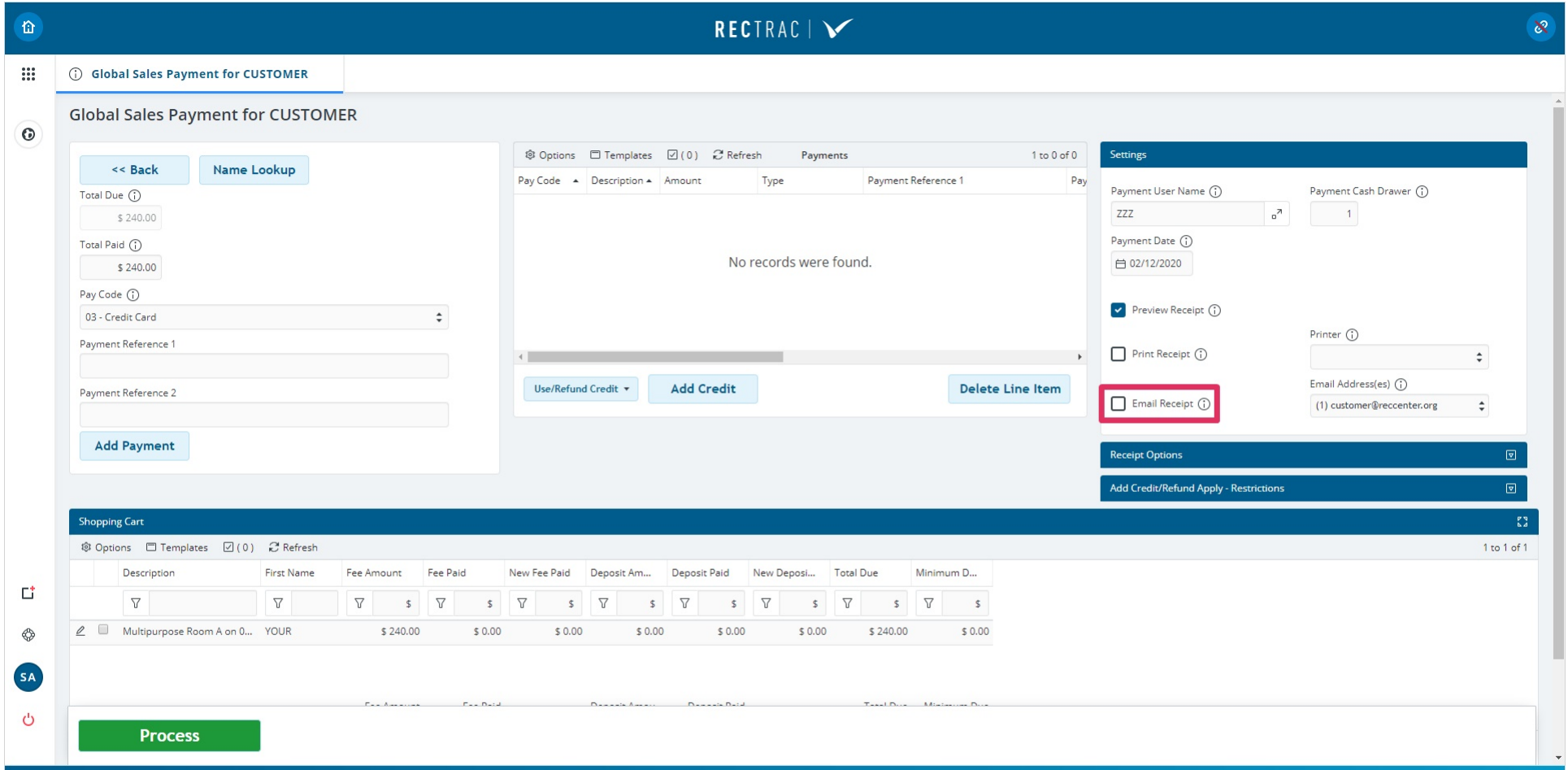

You can choose to print or email YOUR CUSTOMER's receipt under Settings. For this transaction, select Email Receipt.

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RECTRAC LAB CHAPTER 7: FACILITY RESERVATION WALKTHROUGH

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Global Sales Payment for CUSTOMER

Global Sales Payment for CUSTOMER

<< Back | Name Lookup

Total Due: $ 240.00

Total Paid: $ 240.00

Pay Code: 03 - Credit Card

Payment Reference 1

Payment Reference 2

Add Payment

Options | Templates | (0) | Refresh | Payments | 1 to 0 of 0

Pay Code	Description	Amount	Type	Payment Reference 1	Pay

No records were found.

Use/Refund Credit | Add Credit | Delete Line Item

Settings

Payment User Name: ZZZ

Payment Cash Drawer: 1

Payment Date: 02/12/2020

Preview Receipt

Print Receipt

Printer

Email Receipt

Email Address(es): (1) customer@reccenter.org

Receipt Options

Add Credit/Refund Apply - Restrictions

Shopping Cart

Options | Templates | (0) | Refresh | 1 to 1 of 1

Description	First Name	Fee Amount	Fee Paid	New Fee Paid	Deposit Am...	Deposit Paid	New Deposi...	Total Due	Minimum D...
Multipurpose Room A on 0...	YOUR	$ 240.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 240.00	$ 0.00

Process

After you review the checkout options with YOUR CUSTOMER, click Process to finalize the sale!

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Changes

- ***Sometimes reservations need to be updated.*** With this lesson, we'll investigate how to change facility reservations using the Purchase History tab.

- ***Everything about a facility reservation can be changed.*** With the help of Purchase History, you can update reservation details and even change facilities.

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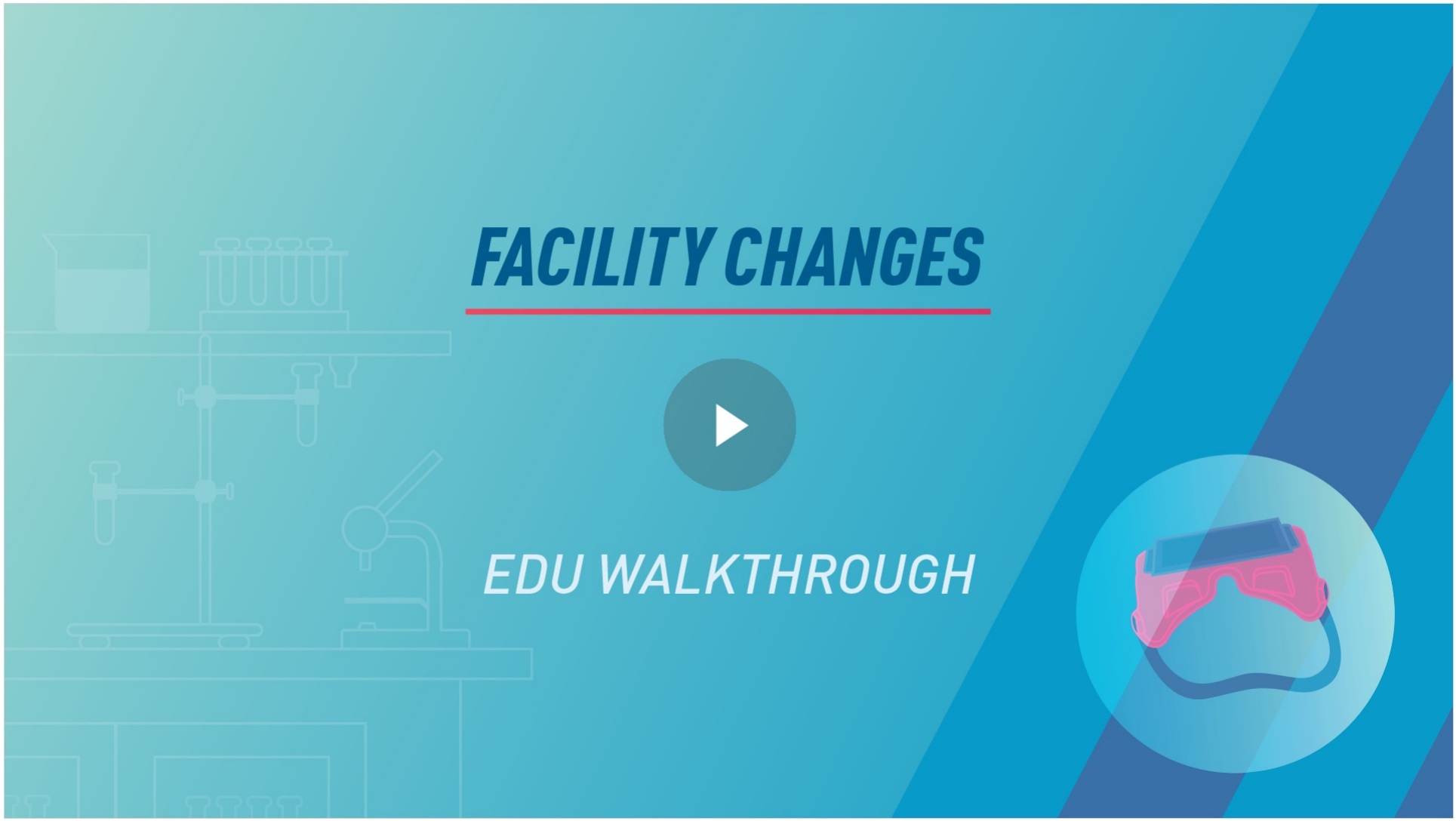

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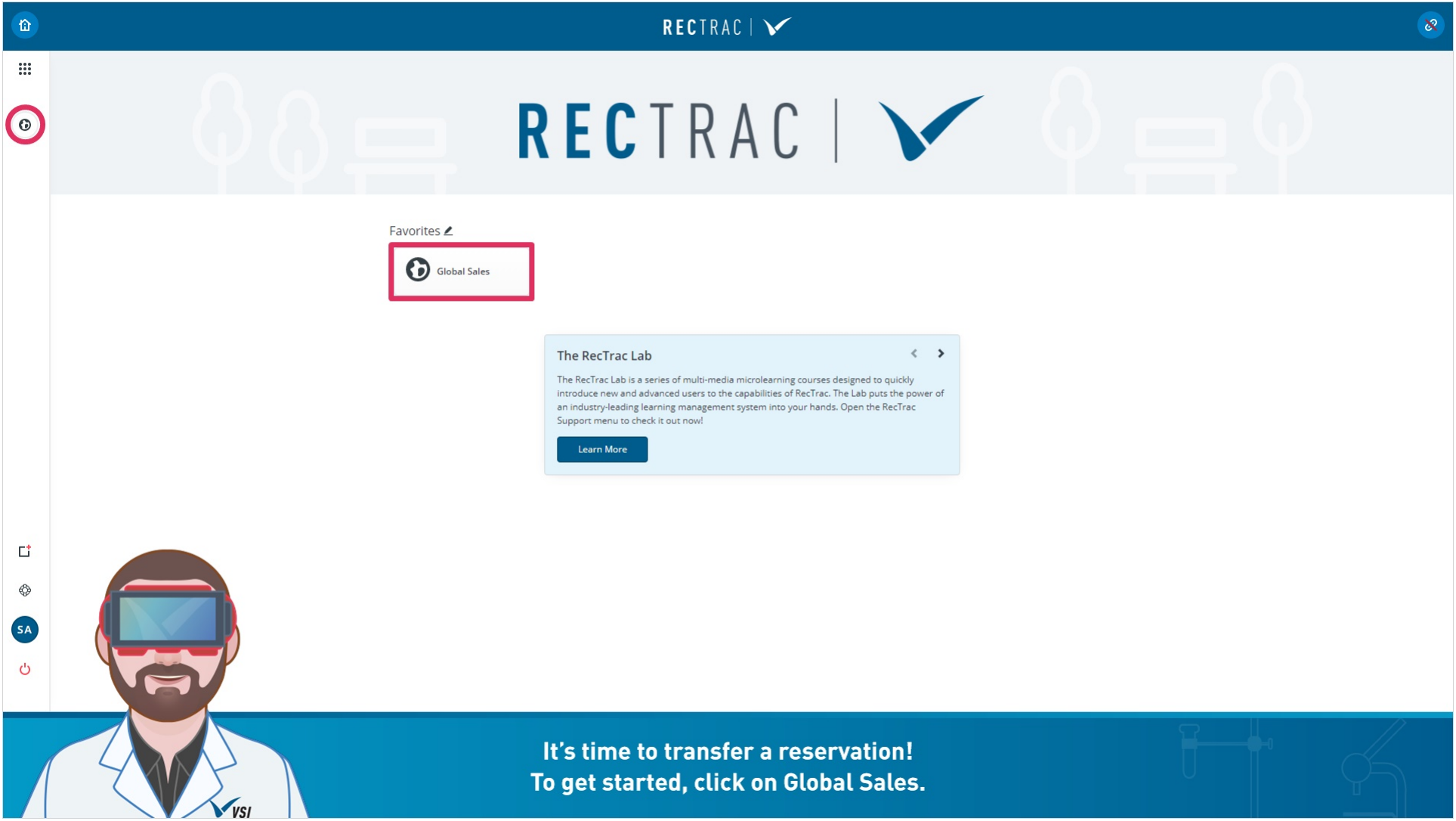

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RECTRAC

Global Sales Lookup

Global Sales Lookup

Lookup | Search

Options | Templates | (1) | Refresh | Family Member Datagrid | 1 to 16 of 48 (Filtered from 48)

Last Name	First Name	Status	Birthday	HH Address 1	HH Email Address	HH ID	Category
		(1) Active					(0) Selected
Ackbar	Admiral	Active	01/01/1965	1 Cruiser Way	aackbar@moncala.org	14	Resident
Ackbar	Little	Active	09/01/2015	1 Cruiser Way	aackbar@moncala.org	14	Resident
Amidala	Padmé	Active	05/19/1999	Naboo	padme@galacticrepublic.gov	7	Resident
Antilles	Wedge	Active	05/25/1977	X-Wing Starfighter	wedge@roguesquad.org	38	Resident
C-3PO	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident
Calrissian	Lando	Active	05/21/1980	Cloud City	lando@millenniumfalcon.org	8	Resident
Chewbacca	Mr	Active	05/25/1977	Millennium Falcon	chewie@millenniumfalcon.com	16	Resident
CUSTOMER	YOUR	Active		Your Customer's Address	customer@reccenter.org	10	Resident
Fett	Boba	Active	05/25/1977	Kamino	bobafett@mandalorian.com	23	Resident
Greedo	Mr	Active	05/25/1977	Tatooine	greedo@bountyhunter.edu	35	Resident
Hutt	Jabba The	Active	05/25/1977	Tatooine	jabba@thehutt.org	9	Resident
Kenobi	Obi Wan	Active	05/25/1977	Tatooine	obiwan@jediknights.com	18	Resident
Mothma	Mon	Active	05/25/1983	The Senate	mothma@galacticsenate.gov	40	Resident
Nunb	Nien	Active	05/25/1983	Sullust	nnunb@sullust.com	6	Resident
Organa	Leia	Active	05/25/1977	Alderaan	leia@rebelalliance.org	27	Resident
R2-D2	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident

SA

Add | Change Household | More | Skip | Select

We need to find YOUR CUSTOMER's account in order to change their reservation.
Click on their household from the list.

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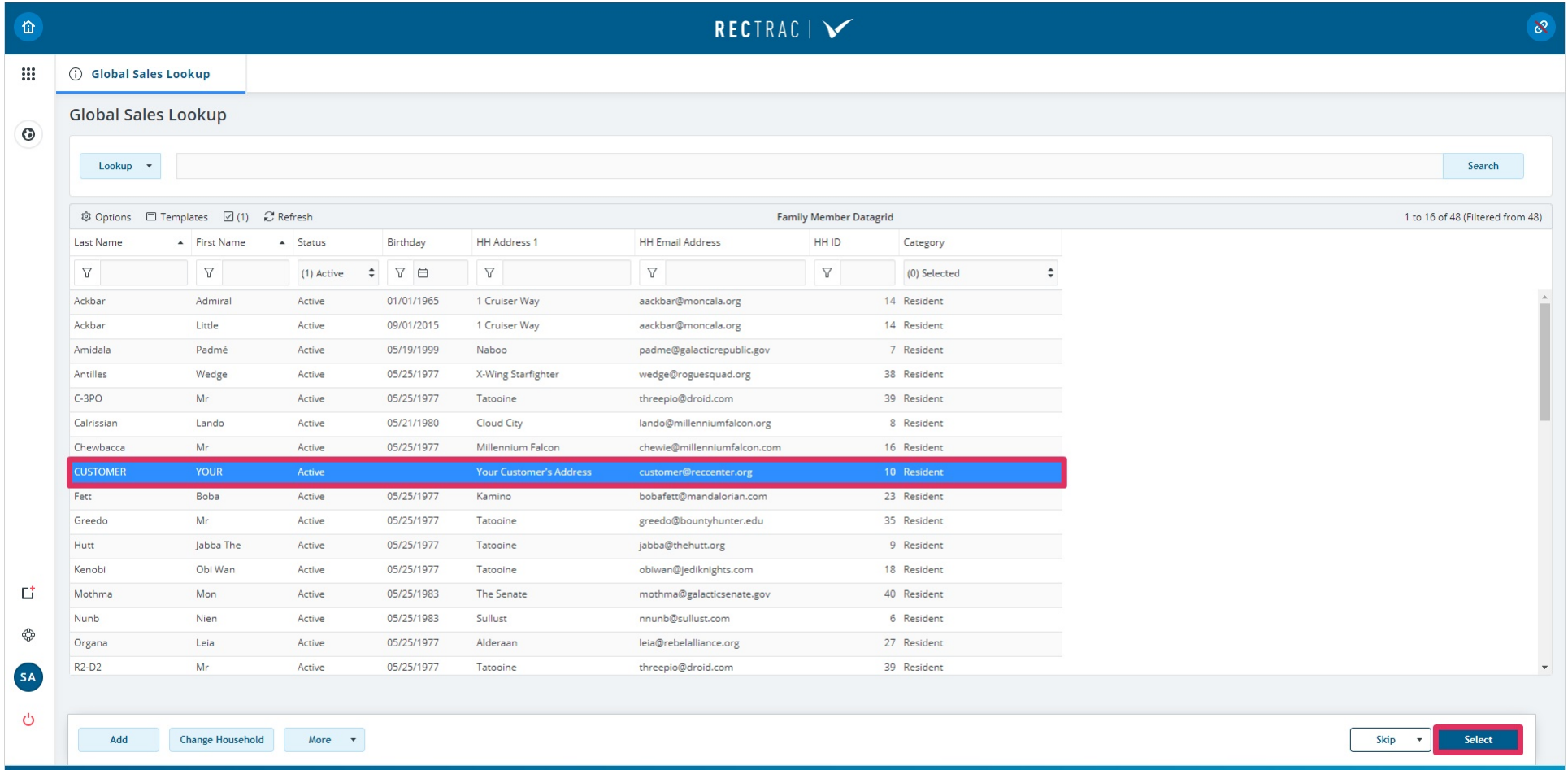

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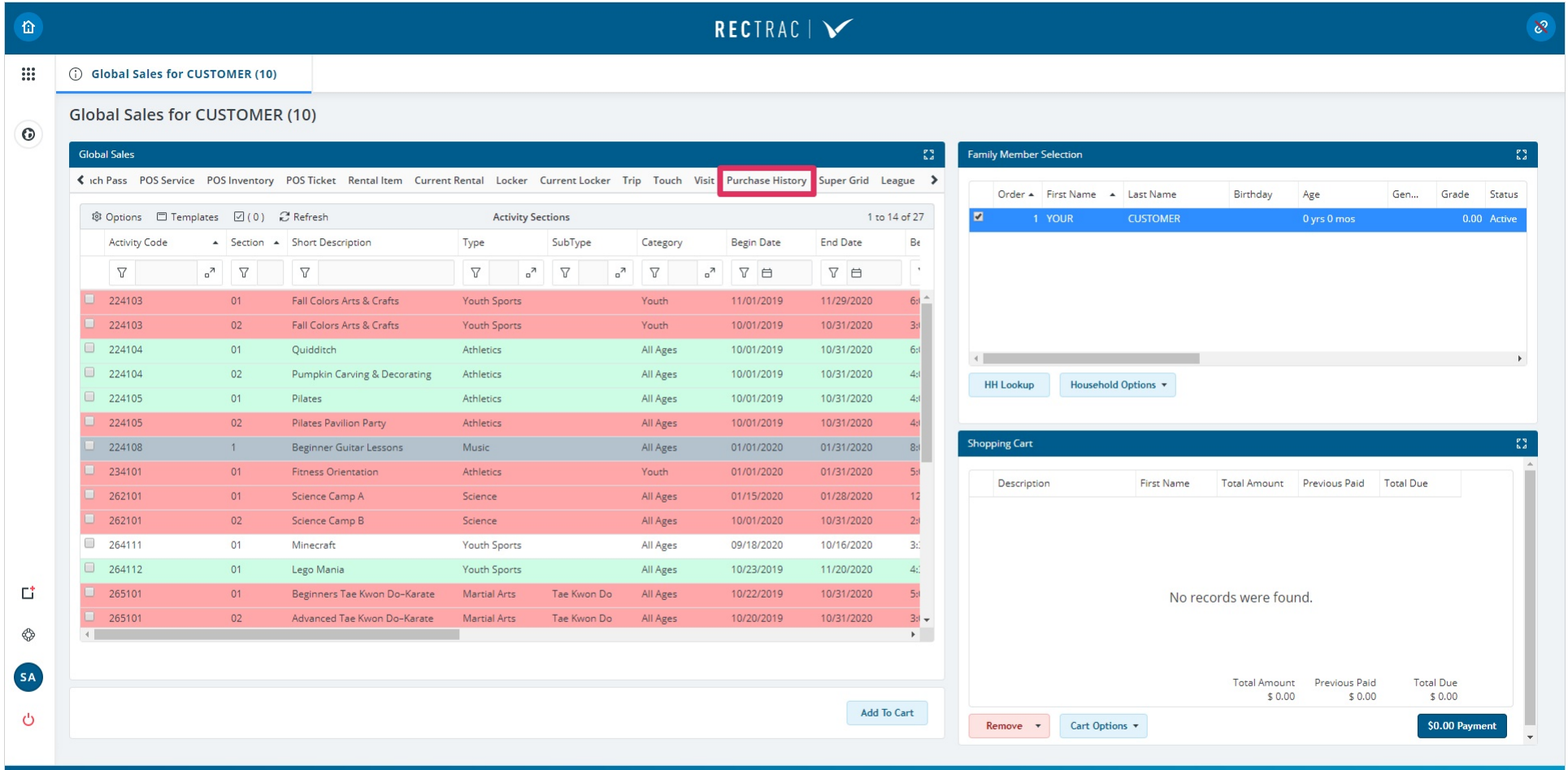

To make a transaction change, select Purchase History from the tabs at the top of the Global Sales screen.

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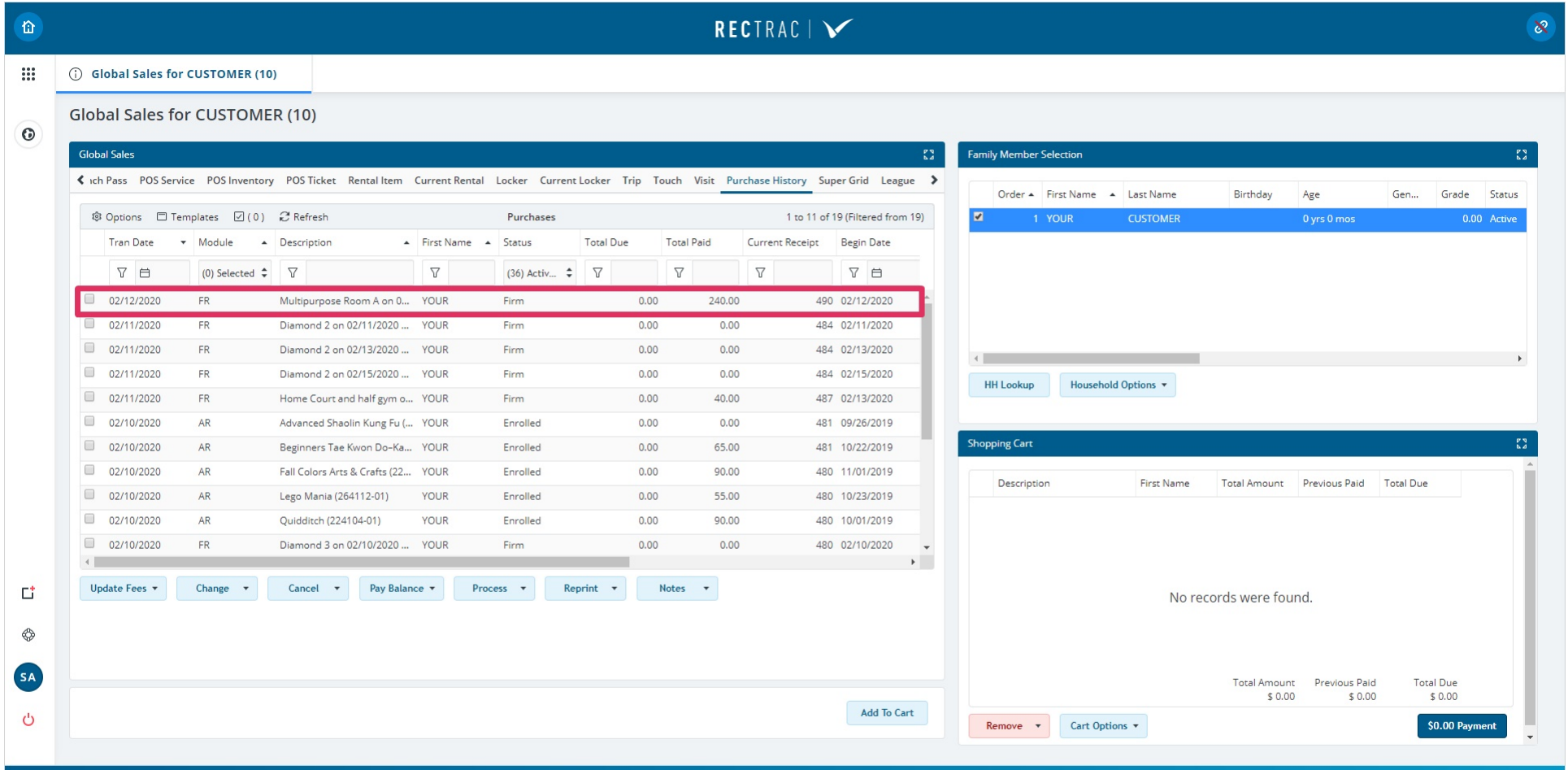

YOUR CUSTOMER wants to change their Multipurpose Room A reservation.
Select it from the Purchases DataGrid.

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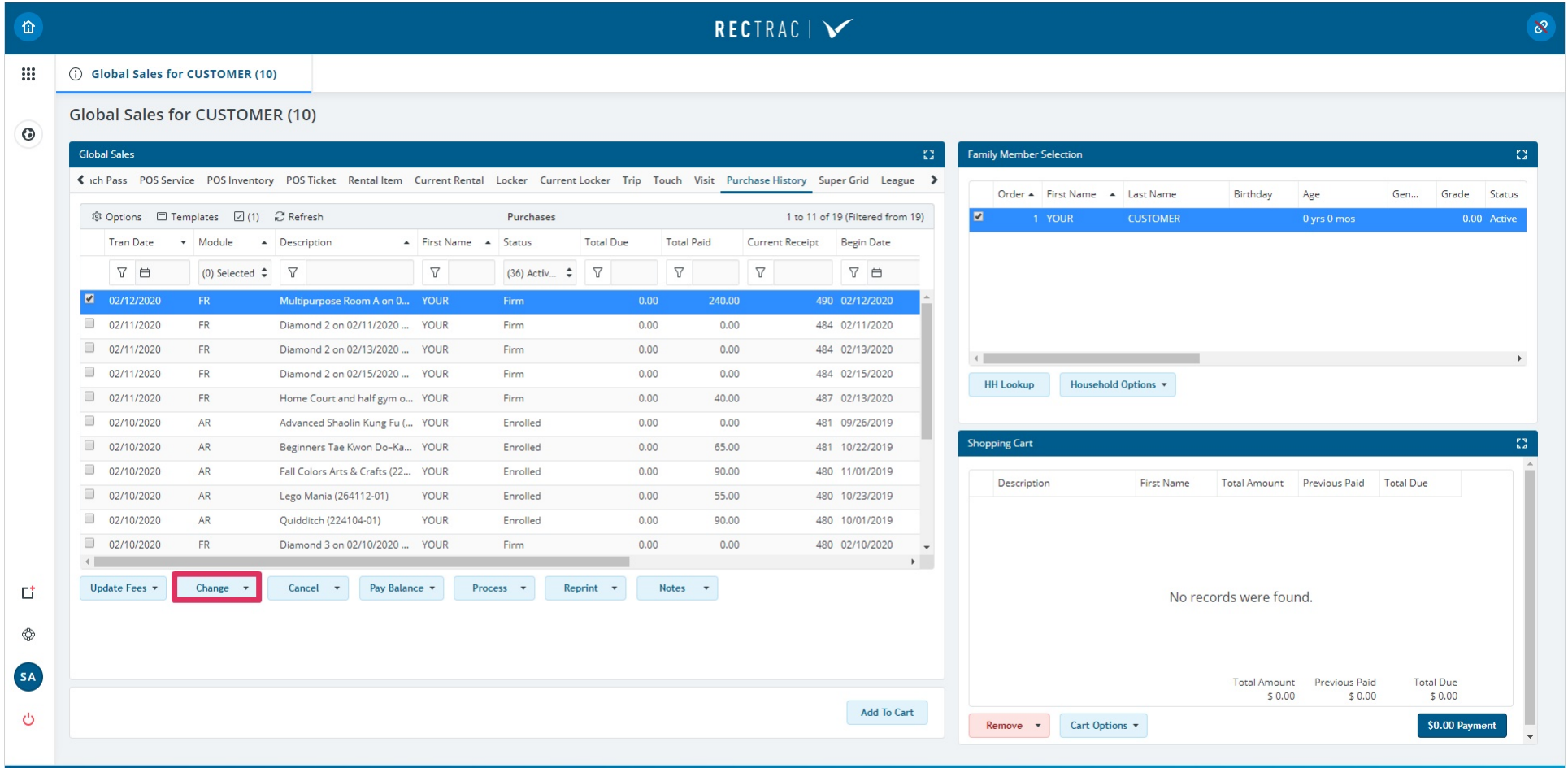

Once Multipurpose Room A is highlighted, click on the Change drop down menu.

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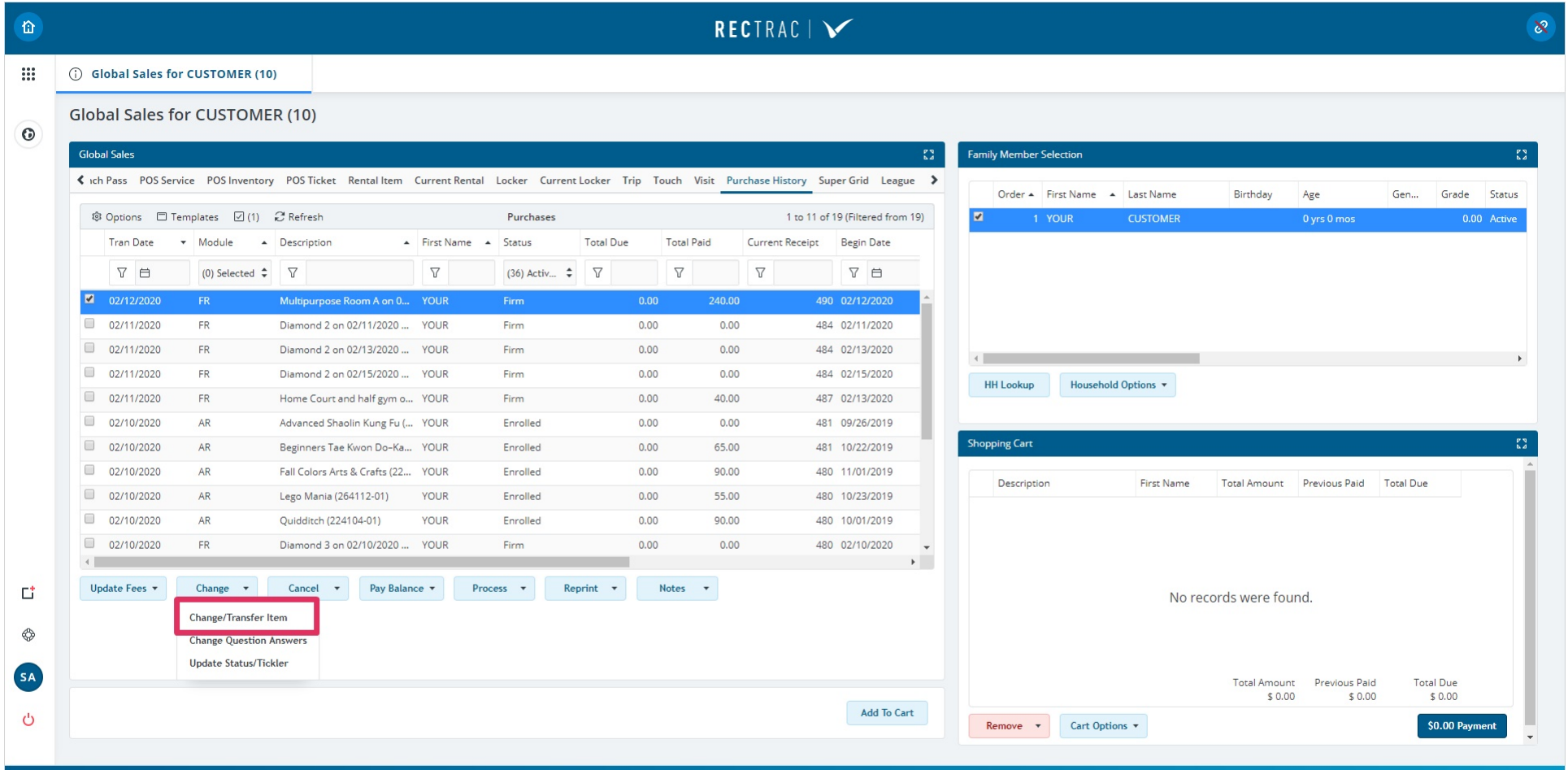

To transfer or change the details of YOUR CUSTOMER's reservation, click on the Change / Transfer Item option.

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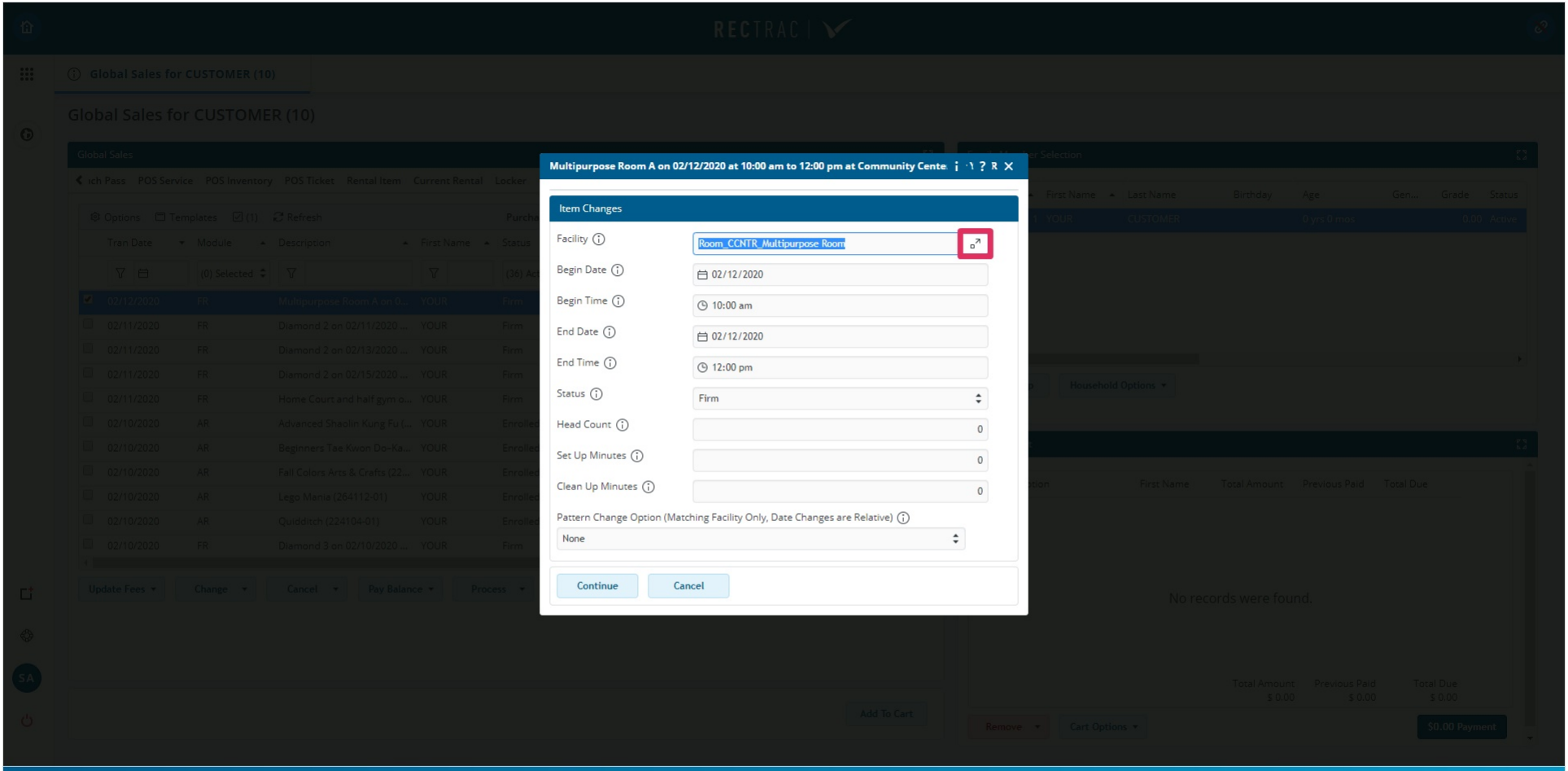

YOUR CUSTOMER wants to transfer their reservation to a new facility.
From the Item Changes popup, click on the ↗ icon.

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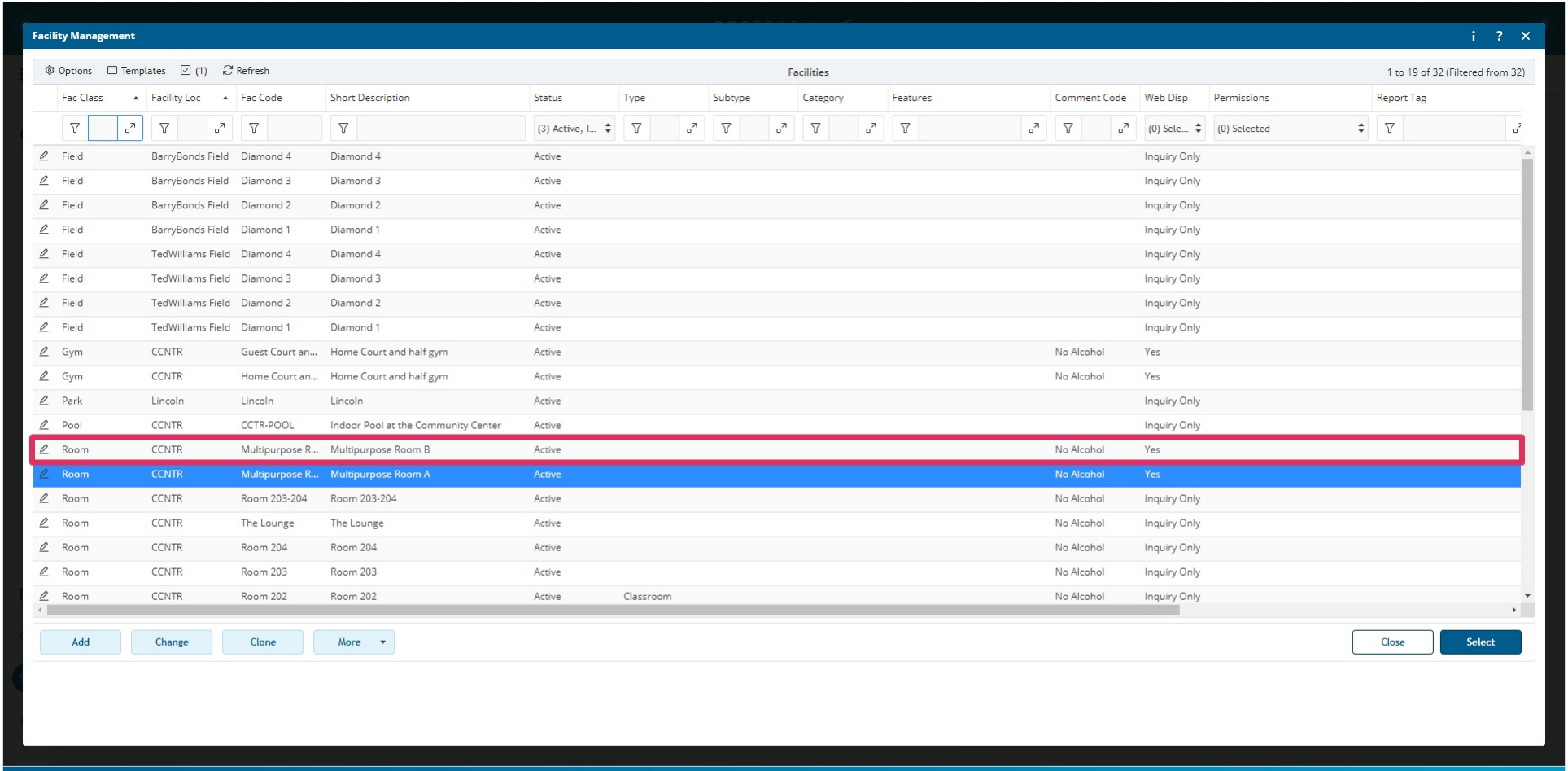

Fac Class	Facility Loc	Fac Code	Short Description	Status	Type	Subtype	Category	Features	Comment Code	Web Disp	Permissions	Report Tag
Field	BarryBonds Field	Diamond 4	Diamond 4	Active						Inquiry Only		
Field	BarryBonds Field	Diamond 3	Diamond 3	Active						Inquiry Only		
Field	BarryBonds Field	Diamond 2	Diamond 2	Active						Inquiry Only		
Field	BarryBonds Field	Diamond 1	Diamond 1	Active						Inquiry Only		
Field	TedWilliams Field	Diamond 4	Diamond 4	Active						Inquiry Only		
Field	TedWilliams Field	Diamond 3	Diamond 3	Active						Inquiry Only		
Field	TedWilliams Field	Diamond 2	Diamond 2	Active						Inquiry Only		
Field	TedWilliams Field	Diamond 1	Diamond 1	Active						Inquiry Only		
Gym	CCNTR	Guest Court an...	Home Court and half gym	Active					No Alcohol	Yes		
Gym	CCNTR	Home Court an...	Home Court and half gym	Active					No Alcohol	Yes		
Park	Lincoln	Lincoln	Lincoln	Active						Inquiry Only		
Pool	CCNTR	CCTR-POOL	Indoor Pool at the Community Center	Active						Inquiry Only		
Room	CCNTR	Multipurpose R...	Multipurpose Room B	Active					No Alcohol	Yes		
Room	CCNTR	Multipurpose R...	Multipurpose Room A	Active					No Alcohol	Yes		
Room	CCNTR	Room 203-204	Room 203-204	Active					No Alcohol	Inquiry Only		
Room	CCNTR	The Lounge	The Lounge	Active					No Alcohol	Inquiry Only		
Room	CCNTR	Room 204	Room 204	Active					No Alcohol	Inquiry Only		
Room	CCNTR	Room 203	Room 203	Active					No Alcohol	Inquiry Only		
Room	CCNTR	Room 202	Room 202	Active	Classroom				No Alcohol	Inquiry Only		

This is where you select YOUR CUSTOMER's new facility. For this transaction, choose Multipurpose Room B.

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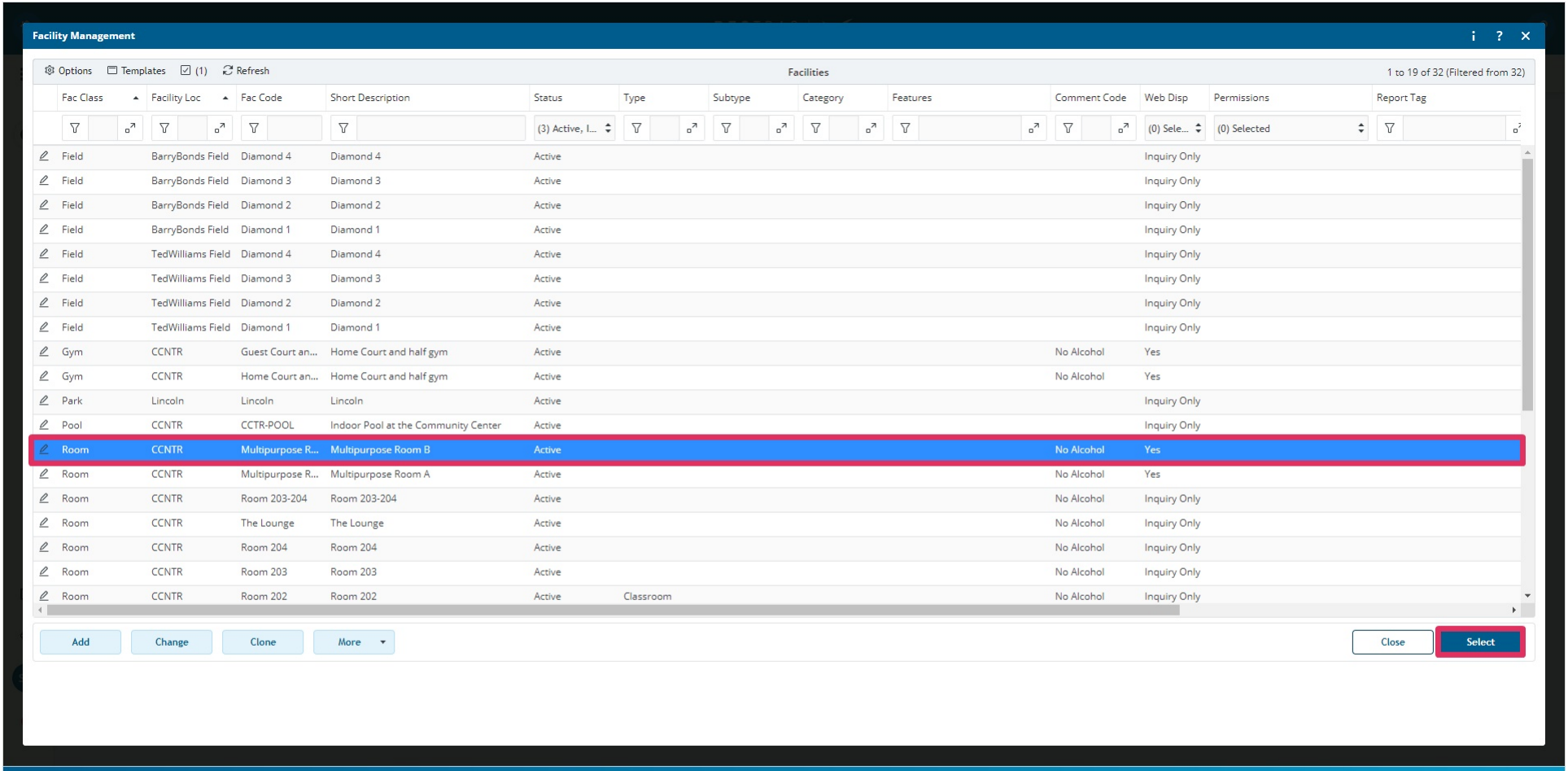

Once you've chosen YOUR CUSTOMER's new facility, double click on it or press the Select button.

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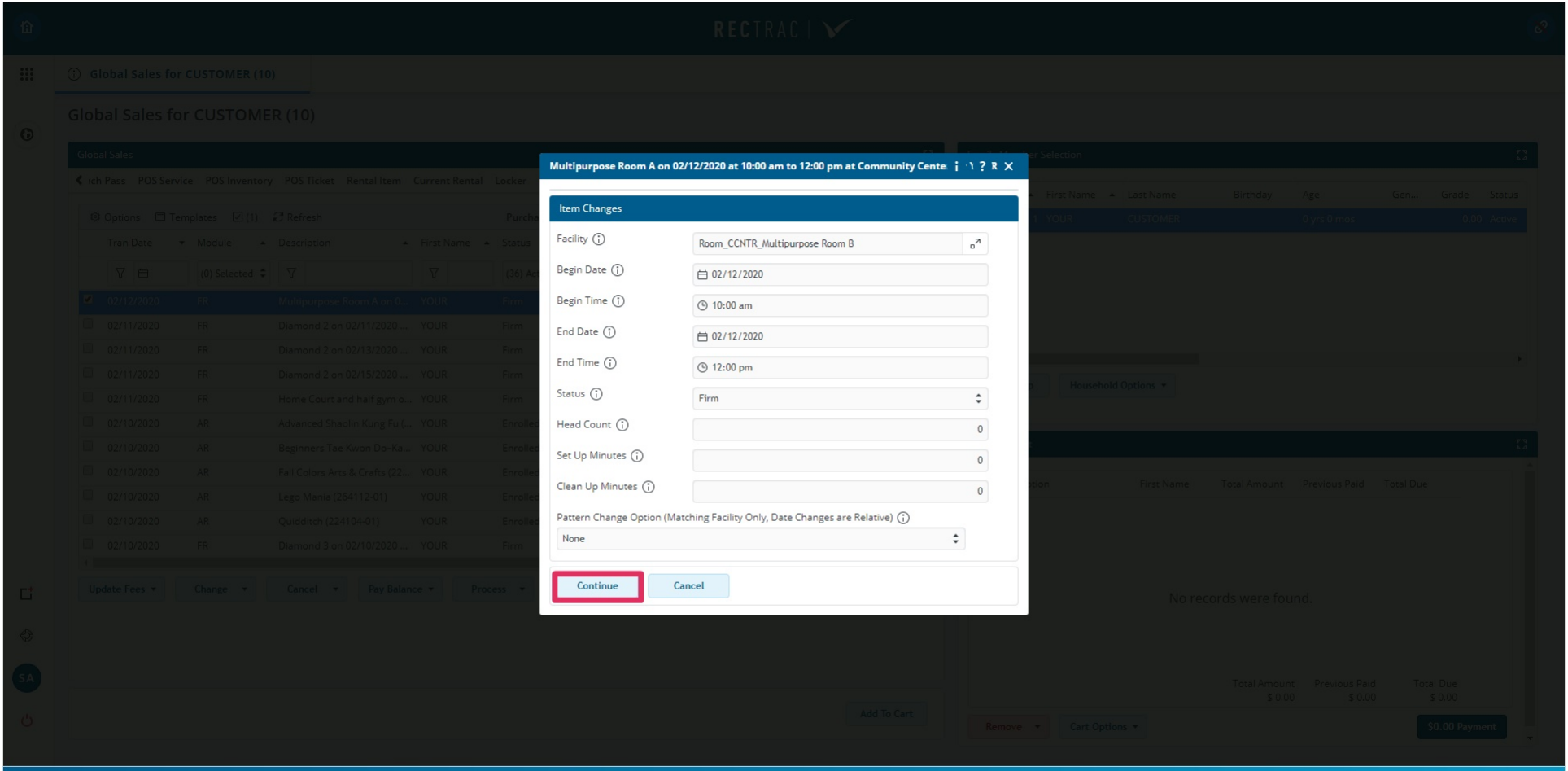

You can edit all of the details on the Item Changes popup. Review any reservation changes with YOUR CUSTOMER, then press Continue.

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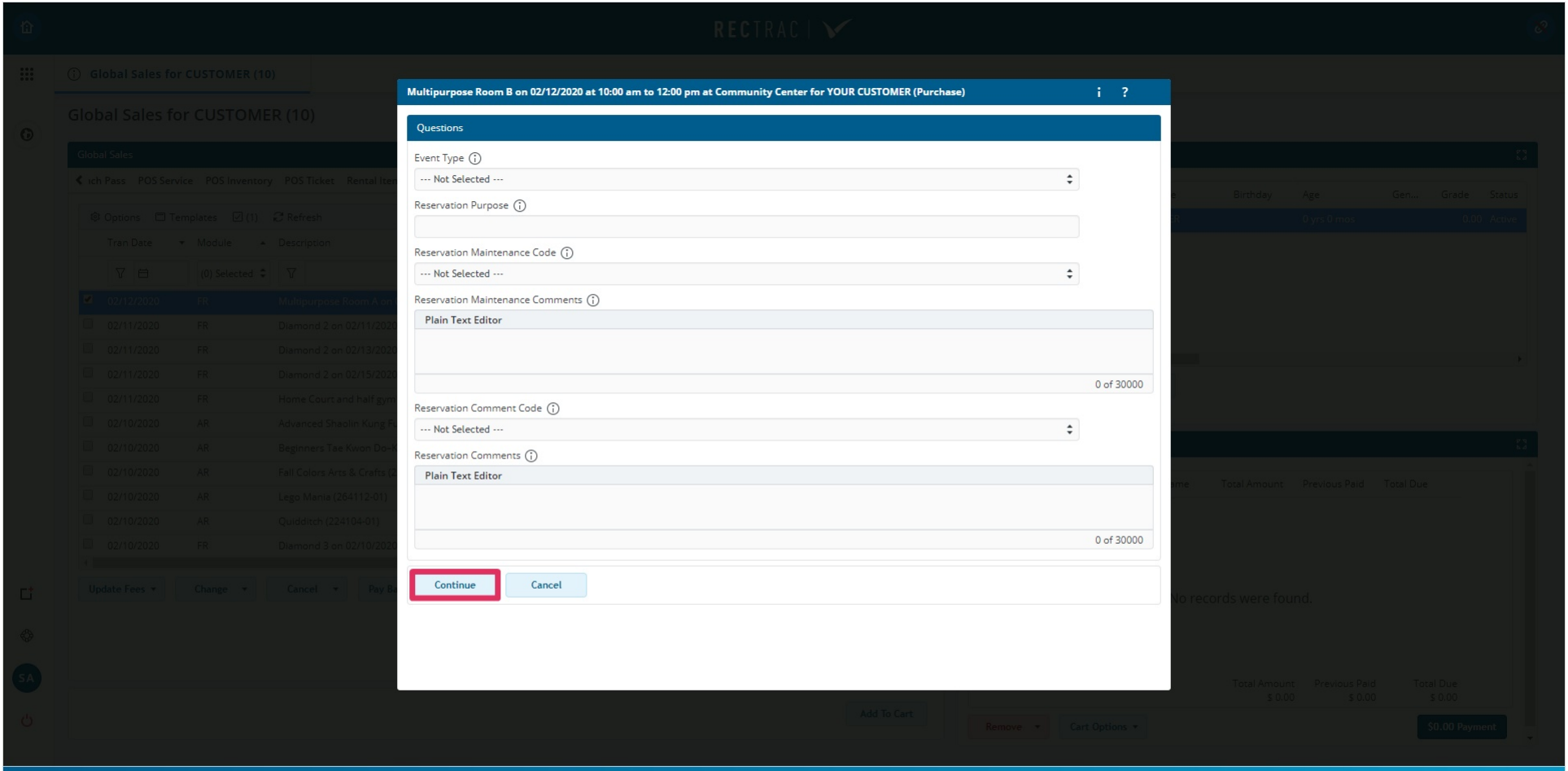

When you come across processing prompts, make sure to read them and fill them out. Then press Continue!

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RECTRAC LAB CHAPTER 7: FACILITY CHANGES WALKTHROUGH

RECTRAC

Global Sales for CUSTOMER (10)

Global Sales for CUSTOMER (10)

Global Sales

ıch Pass | POS Service | POS Inventory | POS Ticket | Rental Item | Current Rental | Locker | Current Locker | Trip | Touch | Visit | Purchase History | Super Grid | League

Options | Templates | (0) | Refresh | Purchases | 1 to 11 of 18 (Filtered from 18)

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
	(0) Selected			(36) Activ...				
02/11/2020	FR	Diamond 2 on 02/11/2020 ...	YOUR	Firm	0.00	0.00	484	02/11/2020
02/11/2020	FR	Diamond 2 on 02/13/2020 ...	YOUR	Firm	0.00	0.00	484	02/13/2020
02/11/2020	FR	Diamond 2 on 02/15/2020 ...	YOUR	Firm	0.00	0.00	484	02/15/2020
02/11/2020	FR	Home Court and half gym o...	YOUR	Firm	0.00	40.00	487	02/13/2020
02/10/2020	AR	Advanced Shaolin Kung Fu (...	YOUR	Enrolled	0.00	0.00	481	09/26/2019
02/10/2020	AR	Beginners Tae Kwon Do-Ka...	YOUR	Enrolled	0.00	65.00	481	10/22/2019
02/10/2020	AR	Fall Colors Arts & Crafts (22...	YOUR	Enrolled	0.00	90.00	480	11/01/2019
02/10/2020	AR	Lego Mania (264112-01)	YOUR	Enrolled	0.00	55.00	480	10/23/2019
02/10/2020	AR	Quidditch (224104-01)	YOUR	Enrolled	0.00	90.00	480	10/01/2019
02/10/2020	FR	Diamond 3 on 02/10/2020 ...	YOUR	Firm	0.00	0.00	480	02/10/2020
02/10/2020	FR	Edenvale on 02/10/2020 at ...	YOUR	Firm	0.00	295.00	480	02/10/2020

Update Fees | Change | Cancel | Pay Balance | Process | Reprint | Notes

Add To Cart

Family Member Selection

Order	First Name	Last Name	Birthday	Age	Gen...	Grade	Status
1	YOUR	CUSTOMER		0 yrs 0 mos		0.00	Active

HH Lookup | Household Options

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due
Multipurpose Room A on 0...	YOUR	$ 0.00	$ 240.00	$ -240.00
Multipurpose Room B on 0...	YOUR	$ 240.00	$ 0.00	$ 240.00
		Total Amount $ 240.00	Previous Paid $ 240.00	Total Due $ 0.00

Remove | Cart Options | $0.00 Payment

YOUR CUSTOMER's original and new facilities have been added to the Shopping Cart.
The reservation costs are the same. Click on the $0.00 Payment button.

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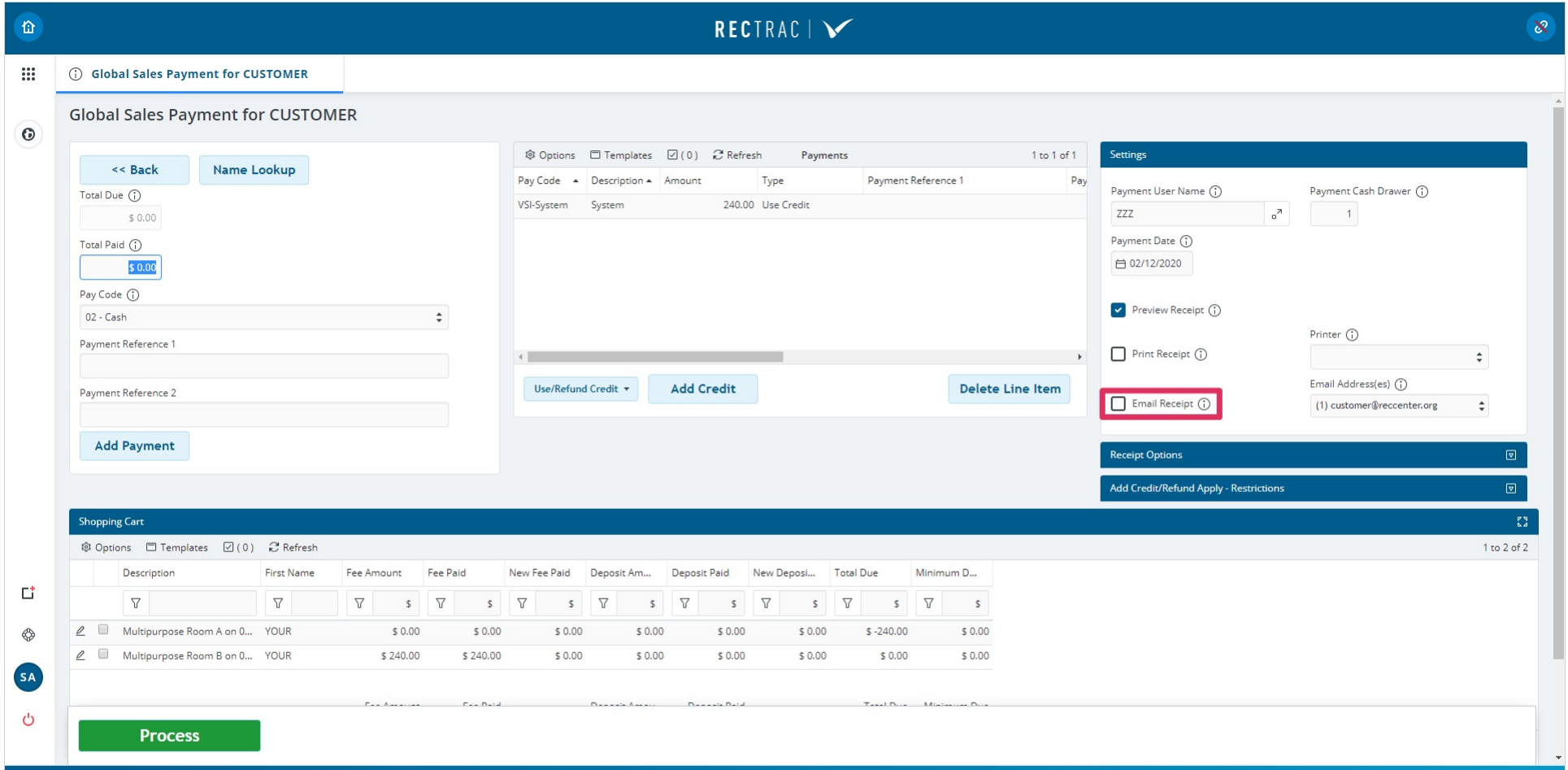
RECTRAC LAB CHAPTER 7: FACILITY CHANGES WALKTHROUGH



Confirm that YOUR CUSTOMER is happy with their facility transfer and review their refund and receipt preferences. For this transaction, select Email Receipt.

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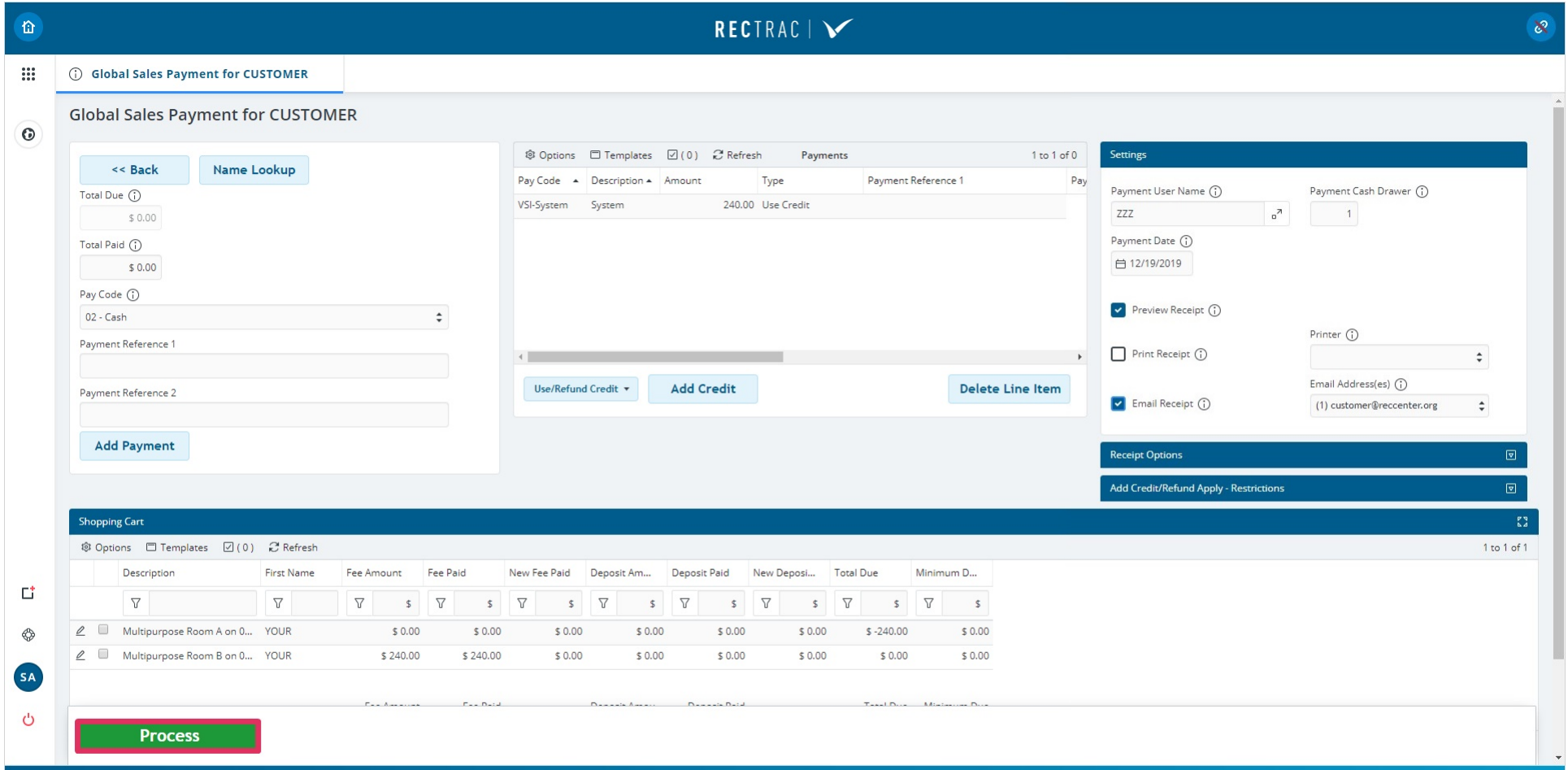
RECTRAC LAB CHAPTER 7: FACILITY CHANGES WALKTHROUGH



When YOUR CUSTOMER gives you the a-okay, click Process to finalize the transfer!

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Cancellations

- ***Cancelling a facility reservation is simple.*** This lesson covers how you can use Purchase History to get the job done.

- ***Don't cry because it's over...*** To cancel a reservation, all you have to do is click Purchase History's Cancel button. RecTrac even calculates a refund, if it's due.

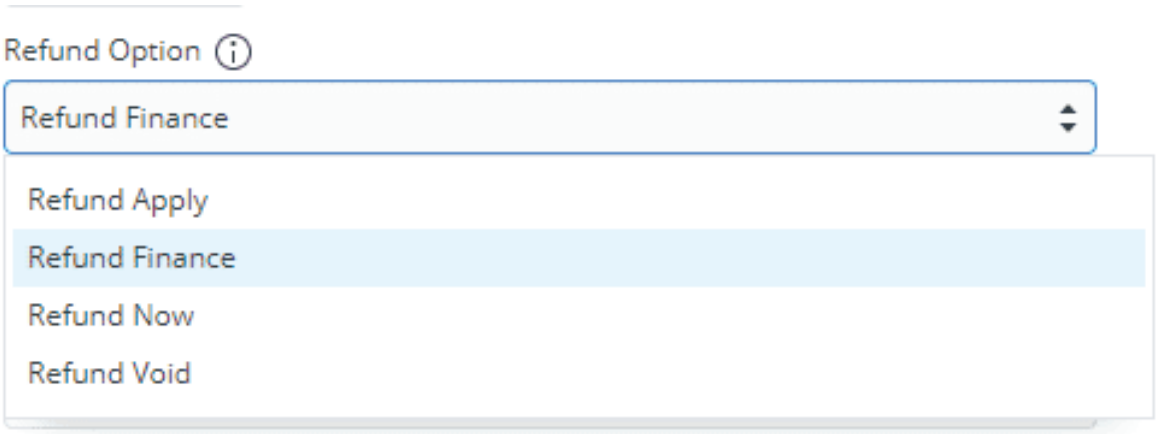
Expert Tip: Refund Options

- ***Refund Options:***

  The refund option we feature in our walkthroughs is **Refund Finance**, which means that your finance department sends a check to your customer. RecTrac provides four refund options (Finance, Apply, Now, and Void). Your department policy determines which ones you use.

  For more information about refunds, head over to:

  RecTrac Lab Chapter 2: Global Sales - The Checkout Screen
  RecTrac Lab Chapter 3: Purchase History - Refunds



- ***Test your skills in the demo database.*** When you've completed this course, check in with your manager and try out a facility reservation, change, and cancellation in your demo database. Extra credit for scheduling a pattern reservation!

  Never fear!
  What you do in demo has no effect on your main RecTrac system.

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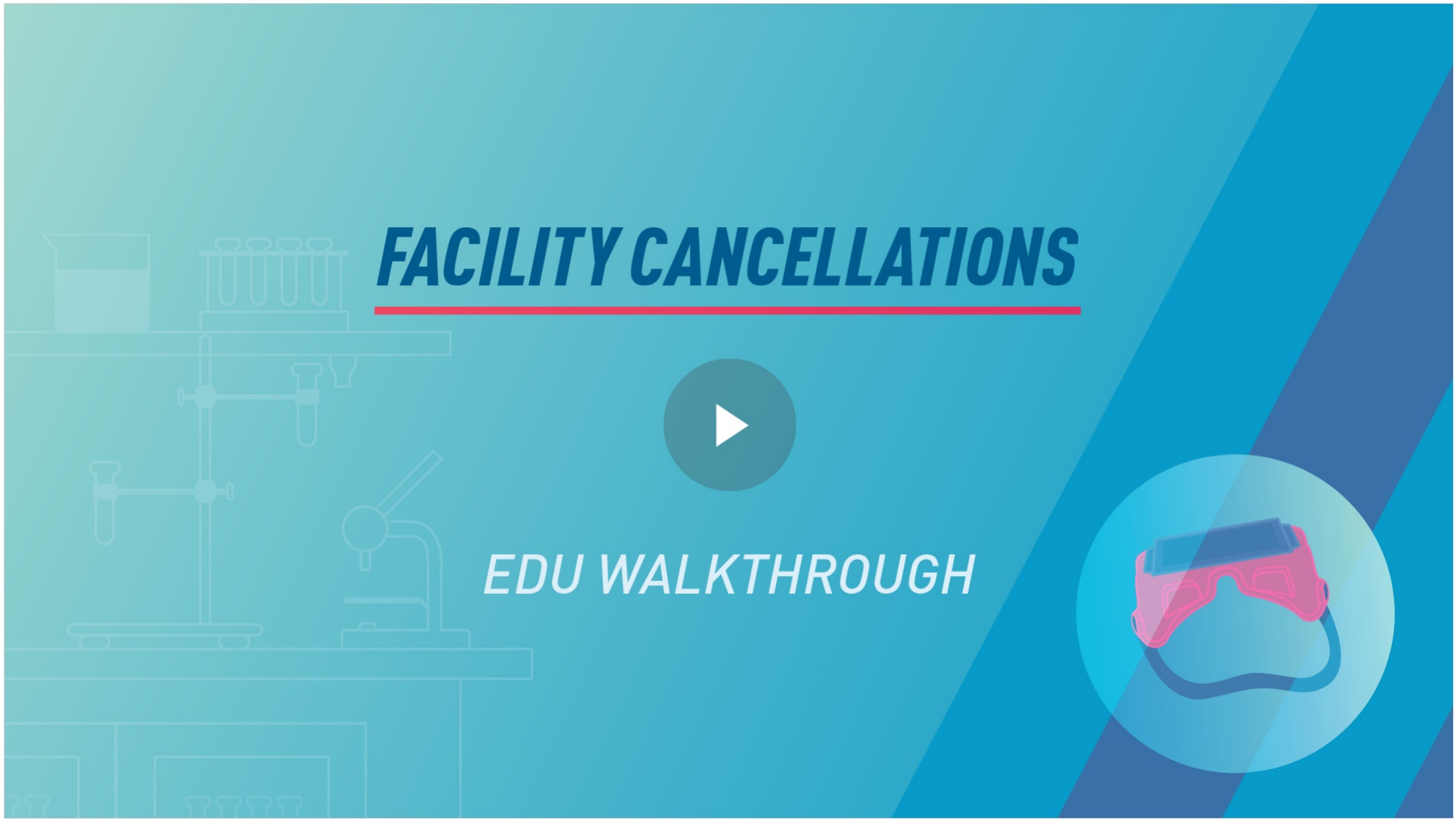

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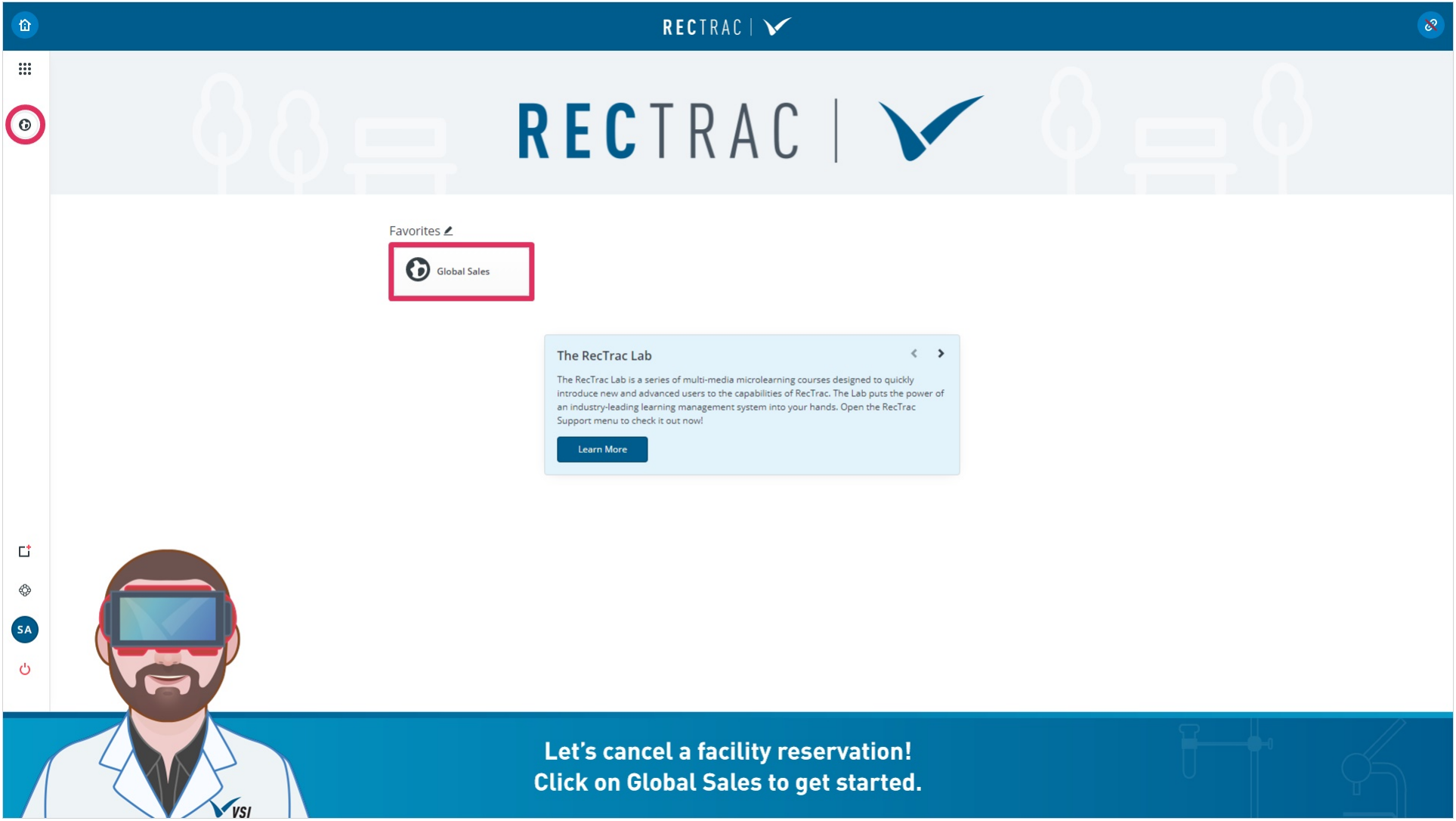
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



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RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH

RECTRAC

Global Sales Lookup

Global Sales Lookup

Lookup | Search

Options | Templates | (1) | Refresh | Family Member Datagrid | 1 to 16 of 48 (Filtered from 48)

Last Name	First Name	Status	Birthday	HH Address 1	HH Email Address	HH ID	Category
		(1) Active					(0) Selected
Ackbar	Admiral	Active	01/01/1965	1 Cruiser Way	aackbar@moncala.org	14	Resident
Ackbar	Little	Active	09/01/2015	1 Cruiser Way	aackbar@moncala.org	14	Resident
Amidala	Padmé	Active	05/19/1999	Naboo	padme@galacticrepublic.gov	7	Resident
Antilles	Wedge	Active	05/25/1977	X-Wing Starfighter	wedge@roguesquad.org	38	Resident
C-3PO	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident
Calrissian	Lando	Active	05/21/1980	Cloud City	lando@millenniumfalcon.org	8	Resident
Chewbacca	Mr	Active	05/25/1977	Millennium Falcon	chewie@millenniumfalcon.com	16	Resident
CUSTOMER	YOUR	Active		Your Customer's Address	customer@reccenter.org	10	Resident
Fett	Boba	Active	05/25/1977	Kamino	bobafett@mandalorian.com	23	Resident
Greedo	Mr	Active	05/25/1977	Tatooine	greedo@bountyhunter.edu	35	Resident
Hutt	Jabba The	Active	05/25/1977	Tatooine	jabba@thehutt.org	9	Resident
Kenobi	Obi Wan	Active	05/25/1977	Tatooine	obiwan@jediknights.com	18	Resident
Mothma	Mon	Active	05/25/1983	The Senate	mothma@galacticsenate.gov	40	Resident
Nunb	Nien	Active	05/25/1983	Sullust	nnunb@sullust.com	6	Resident
Organa	Leia	Active	05/25/1977	Alderaan	leia@rebelalliance.org	27	Resident
R2-D2	Mr	Active	05/25/1977	Tatooine	threepio@droid.com	39	Resident

SA

Add | Change Household | More | Skip | Select

The first step toward cancelling a reservation is finding YOUR CUSTOMER's account. Click on their household from the list.

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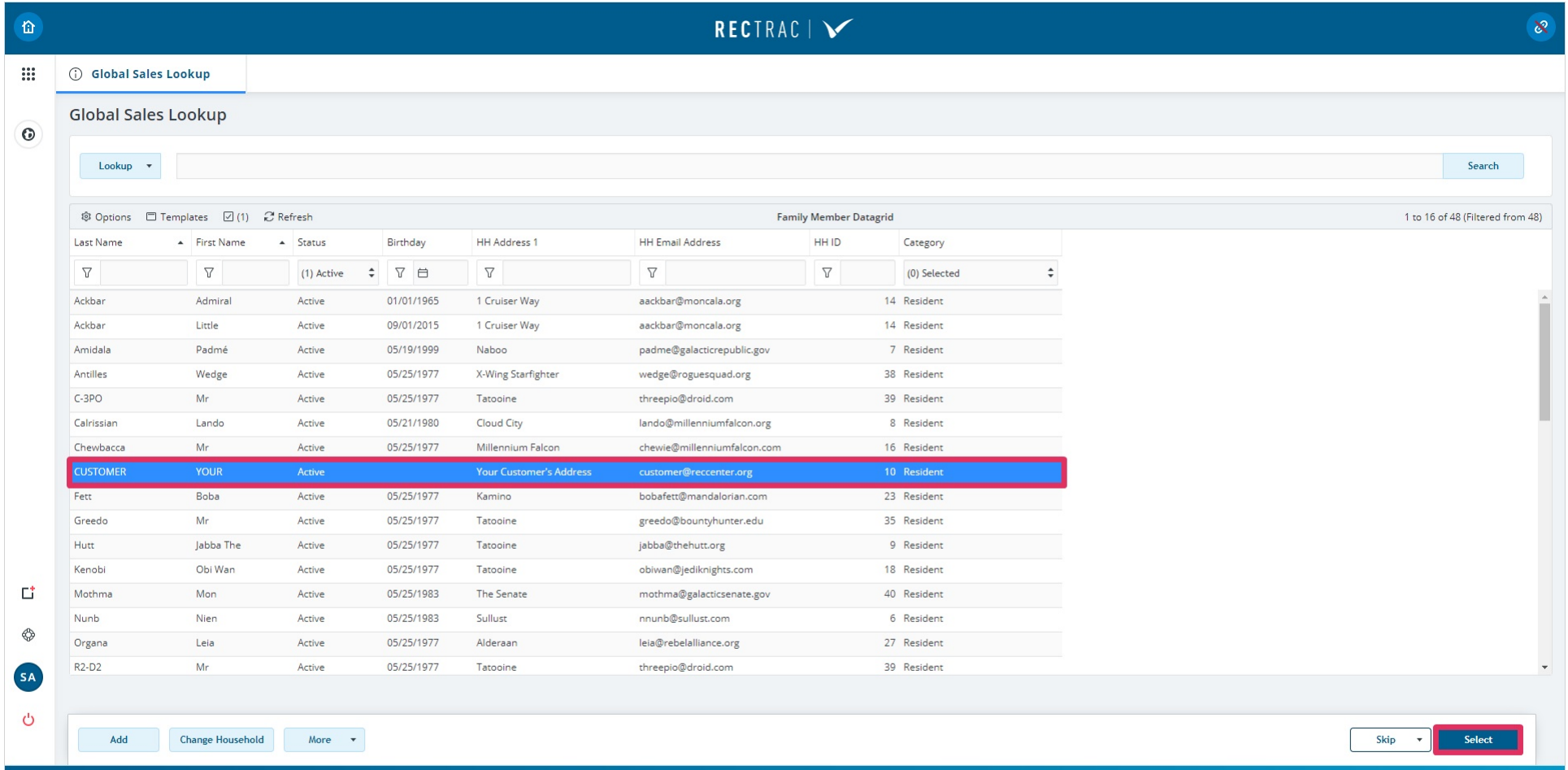
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



Once you've found YOUR CUSTOMER, double click on their line or press the Select button.

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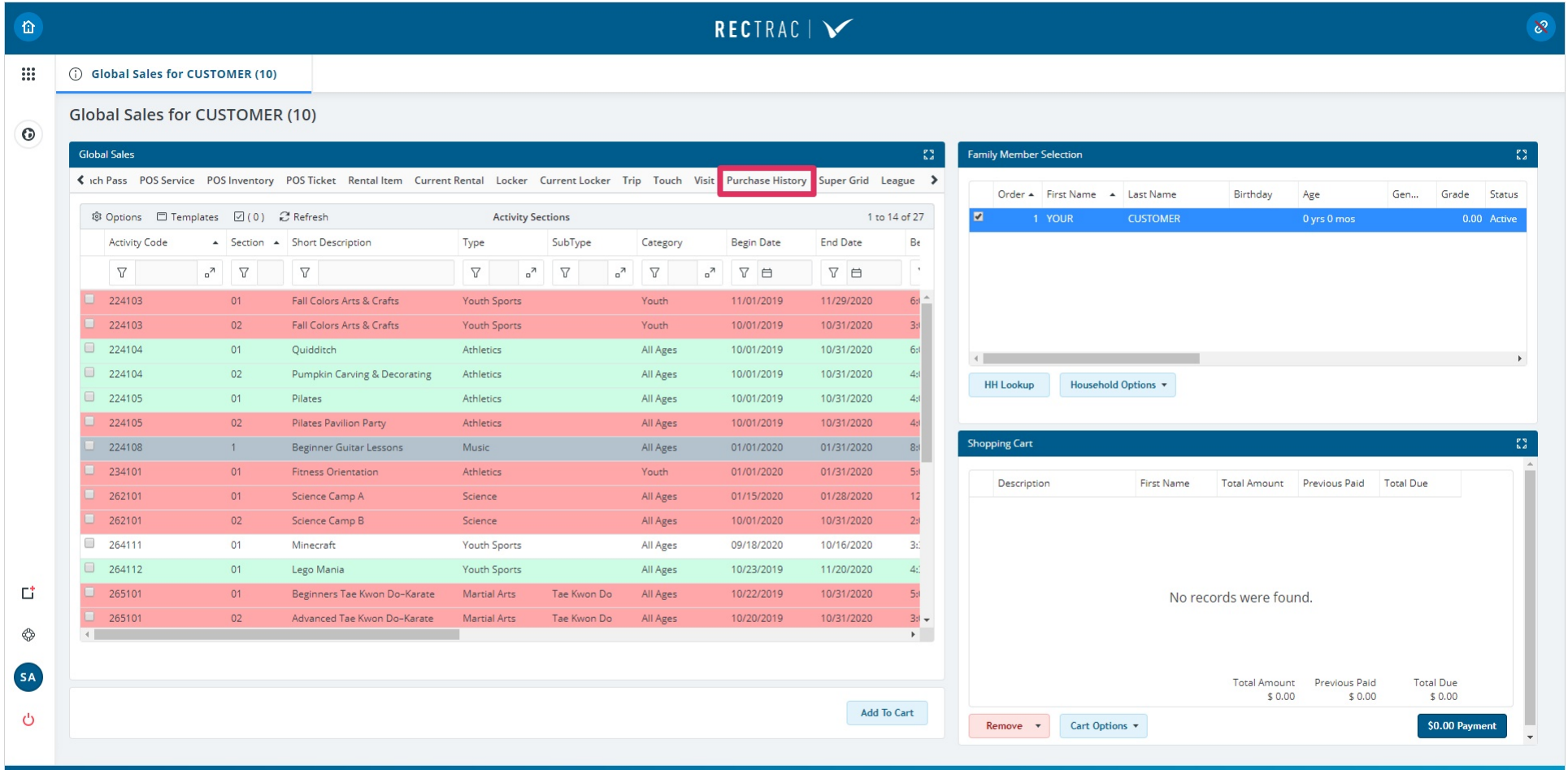
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



You can use Purchase History for changes *and* cancellations.
Select it from the tabs at the top of Global Sales.

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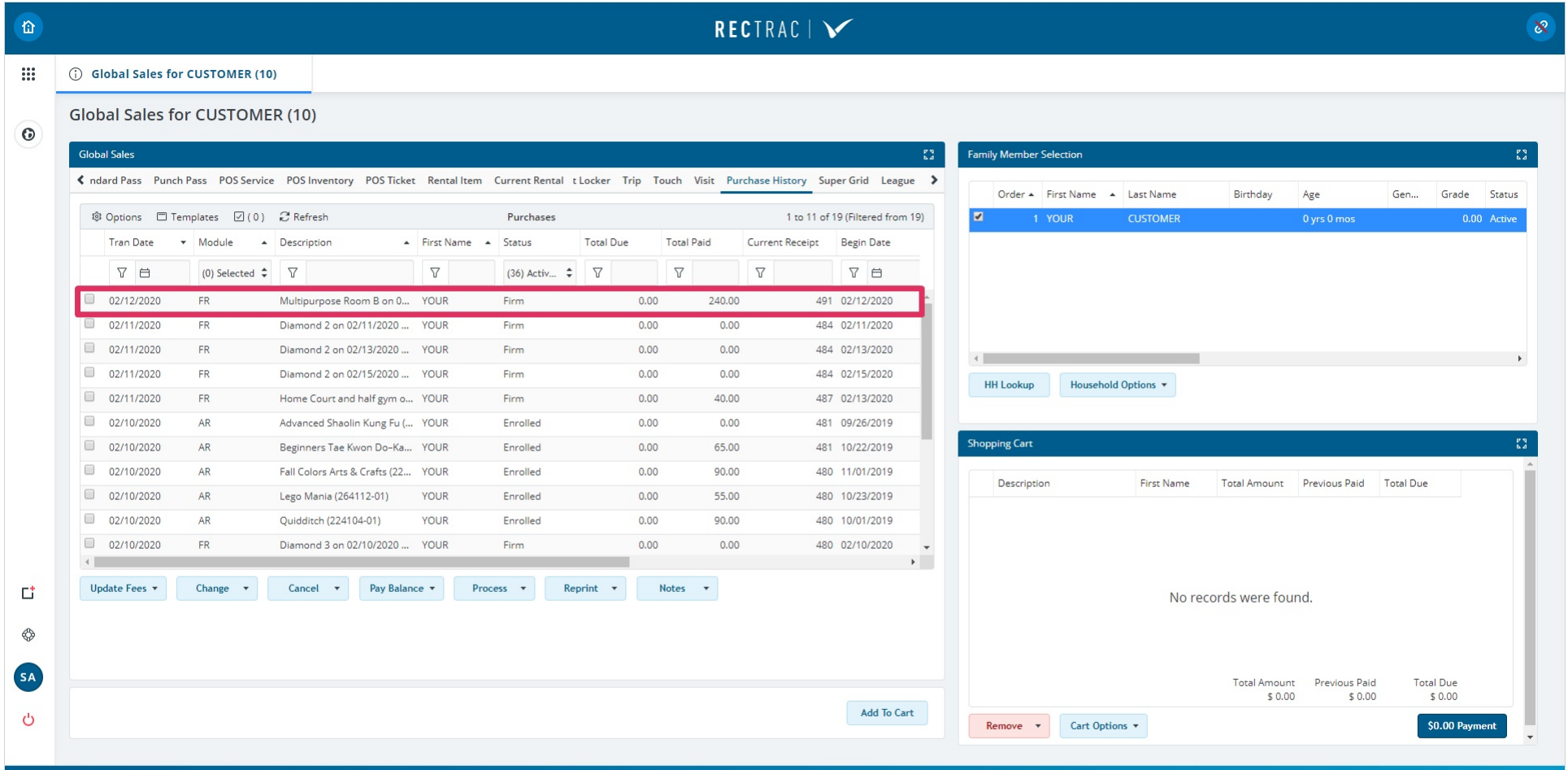
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



If YOUR CUSTOMER wants to cancel their reservation, this is where you'll get the job done. For this cancellation, click on Multipurpose Room B.

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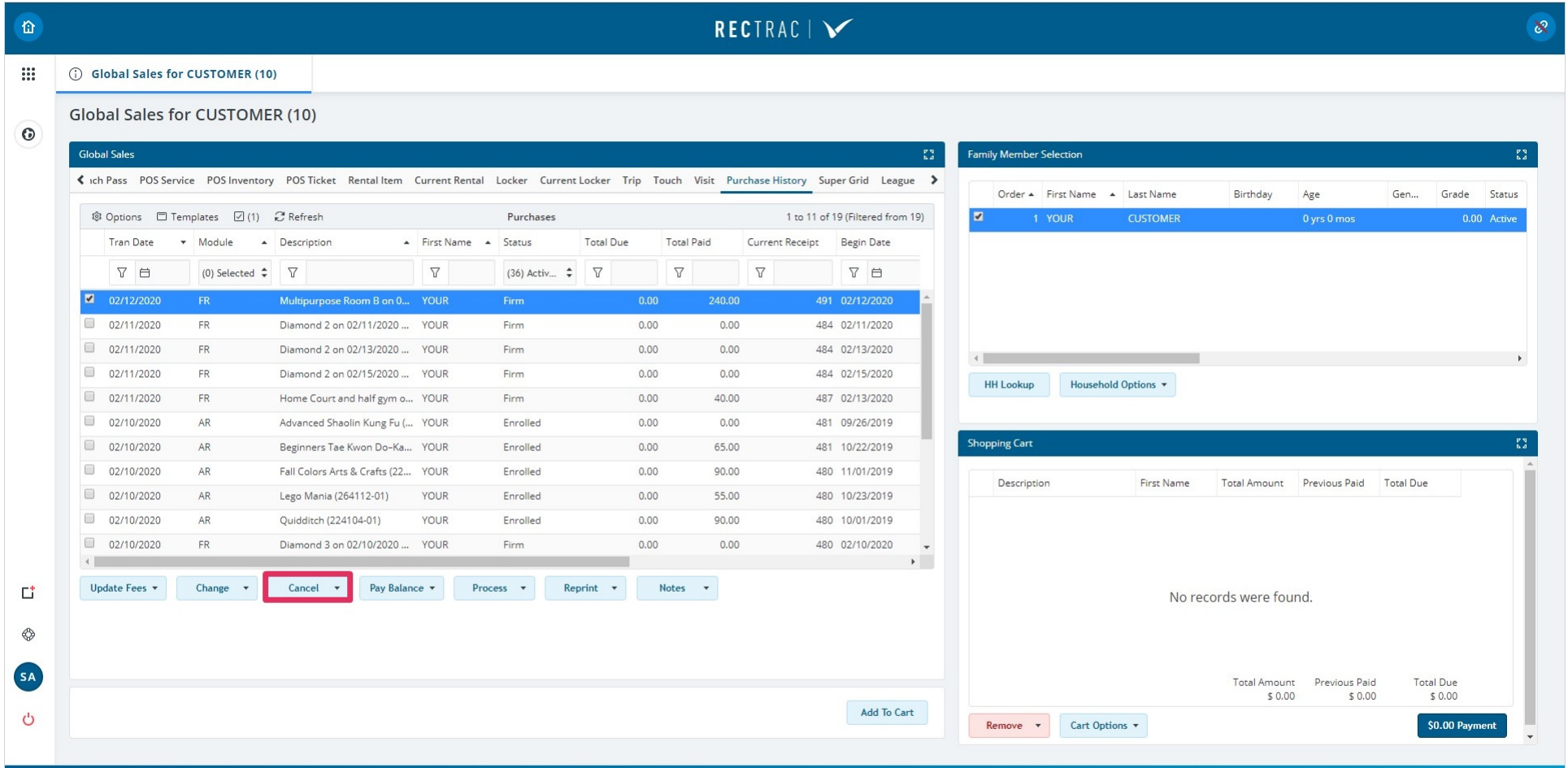
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



Once YOUR CUSTOMER's facility is selected, click on the Cancel drop down menu.

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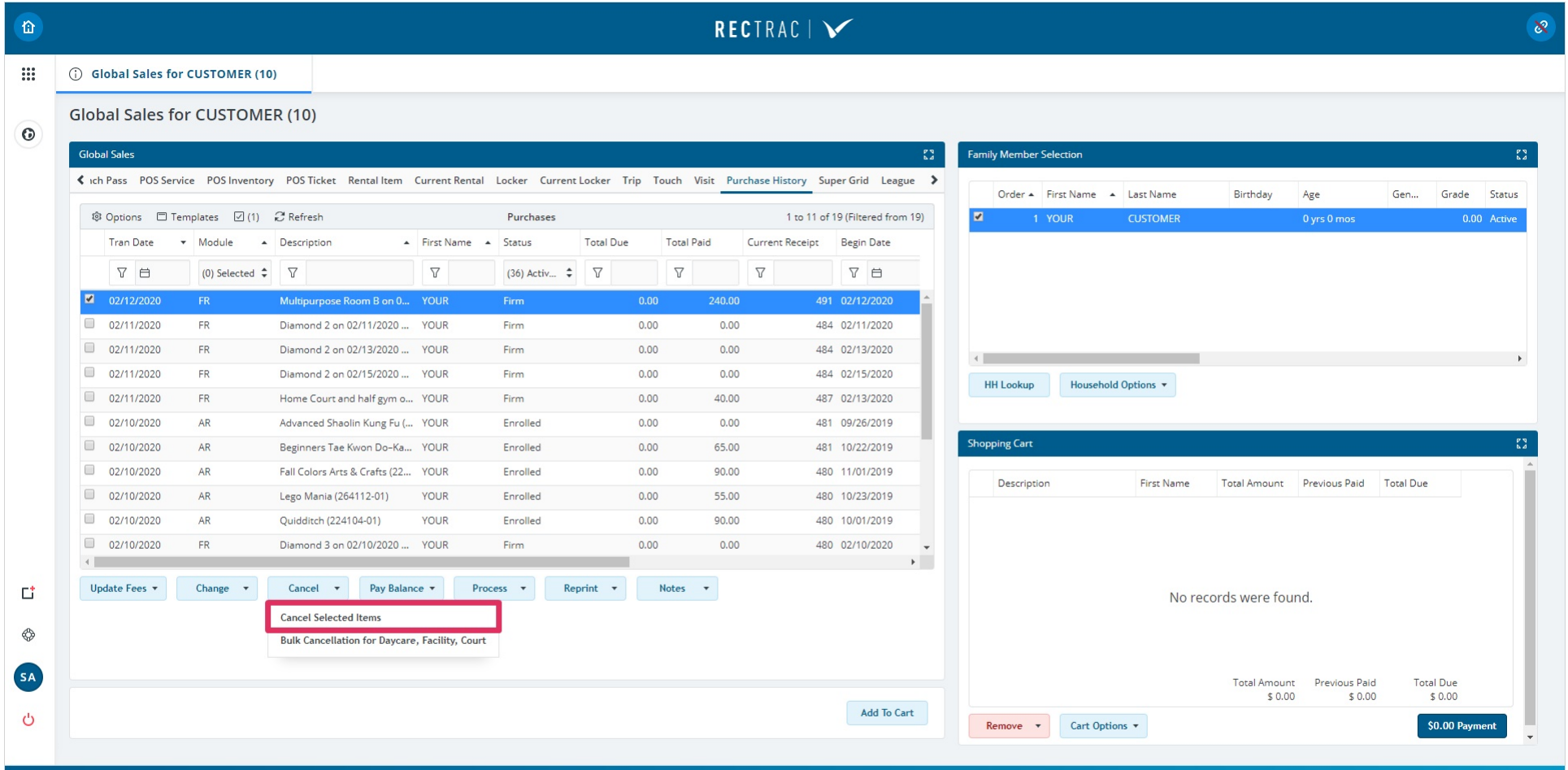
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



Click Cancel Selected Items to start the refund process for YOUR CUSTOMER.

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RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH

RECTRAC

Global Sales for CUSTOMER (10)

Global Sales for CUSTOMER (10)

Global Sales

ıch Pass | POS Service | POS Inventory | POS Ticket | Rental Item | Current Rental | Locker | Current Locker | Trip | Touch | Visit | Purchase History | Super Grid | League

Options | Templates | (0) | Refresh | Purchases | 1 to 11 of 18 (Filtered from 18)

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
	(0) Selected			(36) Activ...				
02/11/2020	FR	Diamond 2 on 02/11/2020 ...	YOUR	Firm	0.00	0.00	484	02/11/2020
02/11/2020	FR	Diamond 2 on 02/13/2020 ...	YOUR	Firm	0.00	0.00	484	02/13/2020
02/11/2020	FR	Diamond 2 on 02/15/2020 ...	YOUR	Firm	0.00	0.00	484	02/15/2020
02/11/2020	FR	Home Court and half gym o...	YOUR	Firm	0.00	40.00	487	02/13/2020
02/10/2020	AR	Advanced Shaolin Kung Fu (...	YOUR	Enrolled	0.00	0.00	481	09/26/2019
02/10/2020	AR	Beginners Tae Kwon Do-Ka...	YOUR	Enrolled	0.00	65.00	481	10/22/2019
02/10/2020	AR	Fall Colors Arts & Crafts (22...	YOUR	Enrolled	0.00	90.00	480	11/01/2019
02/10/2020	AR	Lego Mania (264112-01)	YOUR	Enrolled	0.00	55.00	480	10/23/2019
02/10/2020	AR	Quidditch (224104-01)	YOUR	Enrolled	0.00	90.00	480	10/01/2019
02/10/2020	FR	Diamond 3 on 02/10/2020 ...	YOUR	Firm	0.00	0.00	480	02/10/2020
02/10/2020	FR	Edenvale on 02/10/2020 at ...	YOUR	Firm	0.00	295.00	480	02/10/2020

Update Fees | Change | Cancel | Pay Balance | Process | Reprint | Notes

Add To Cart

Family Member Selection

Order	First Name	Last Name	Birthday	Age	Gen...	Grade	Status
1	YOUR	CUSTOMER		0 yrs 0 mos		0.00	Active

HH Lookup | Household Options

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due
Multipurpose Room B on 0...	YOUR	$ 0.00	$ 240.00	$ -240.00
		Total Amount $ 0.00	Previous Paid $ 240.00	Total Due $ -240.00

Remove | Cart Options | $240.00 Refund

When you click Cancel, YOUR CUSTOMER's facility is added to the Shopping Cart and a refund is calculated automatically. Click on the $240.00 Refund button.

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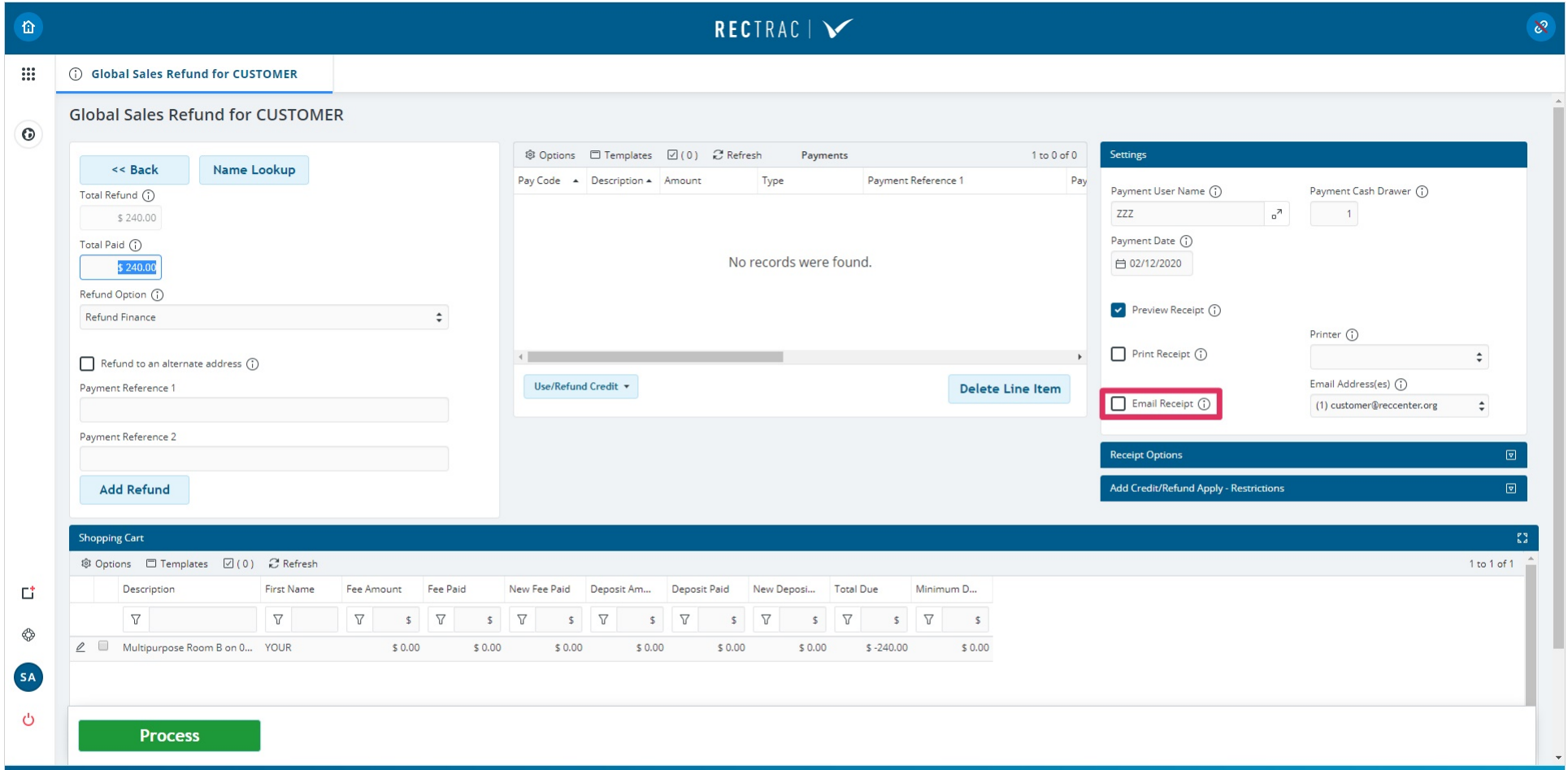
RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH



Review refund and receipt options with YOUR CUSTOMER.
For this transaction, select Email Receipt.

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RECTRAC LAB CHAPTER 7: FACILITY CANCELLATION WALKTHROUGH

RECTRAC

Global Sales Refund for CUSTOMER

Global Sales Refund for CUSTOMER

<< Back | Name Lookup

Total Refund: $ 240.00

Total Paid: $ 240.00

Refund Option: Refund Finance

Refund to an alternate address

Payment Reference 1

Payment Reference 2

Add Refund

Options | Templates | (0) | Refresh | Payments | 1 to 0 of 0

Pay Code	Description	Amount	Type	Payment Reference 1	Pay

No records were found.

Use/Refund Credit | Delete Line Item

Settings

Payment User Name: ZZZ

Payment Cash Drawer: 1

Payment Date: 02/12/2020

Preview Receipt

Print Receipt

Printer

Email Receipt

Email Address(es): (1) customer@reccenter.org

Receipt Options

Add Credit/Refund Apply - Restrictions

Shopping Cart

Options | Templates | (0) | Refresh | 1 to 1 of 1

Description	First Name	Fee Amount	Fee Paid	New Fee Paid	Deposit Am...	Deposit Paid	New Deposi...	Total Due	Minimum D...
Multipurpose Room B on 0...	YOUR	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ -240.00	$ 0.00

Process

Click Process when YOUR CUSTOMER is ready to cancel!

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